

# 2019 YEAR END MARKETING REPORT

Branson Convention & Visitors Bureau  
March 10<sup>th</sup>, 2020

---



# Overview

## EXECUTIVE SUMMARY

*Pages 3-6*

### 1 KEY PERFORMANCE INDICATORS

*Pages 7-11*

### 2 BEHAVIORIAL PROFILE

*Pages 12-34*

### 3 TRAVEL PLANNING & FUTURE EXPERIENCES

*Pages 35-40*

### 4 U.S. TRAVEL PERFORMANCE

*Pages 41-43*

**Purpose.** The purpose of conducting the annual Visitor Profile Study for the Branson Convention & Visitors Bureau is to provide area decision makers a behavioral, demographic and trend comparison of Branson travelers over the course of the year. This information provides marketers and other decision makers with near real-time information throughout the year on who is visiting Branson and where the greatest changes are occurring.

**Target Audience.** Contact information collected from Branson visitors from more than 25 locations around the Branson area was used to interview visitors via email.

**Sample.** A total of 2,185 Branson visitors were interviewed for this study throughout the year, providing a maximum margin of error of +/-2.1% at a 95% confidence interval – considered comparatively strong by industry standards.



Branson 2019 Visitor Profile Research

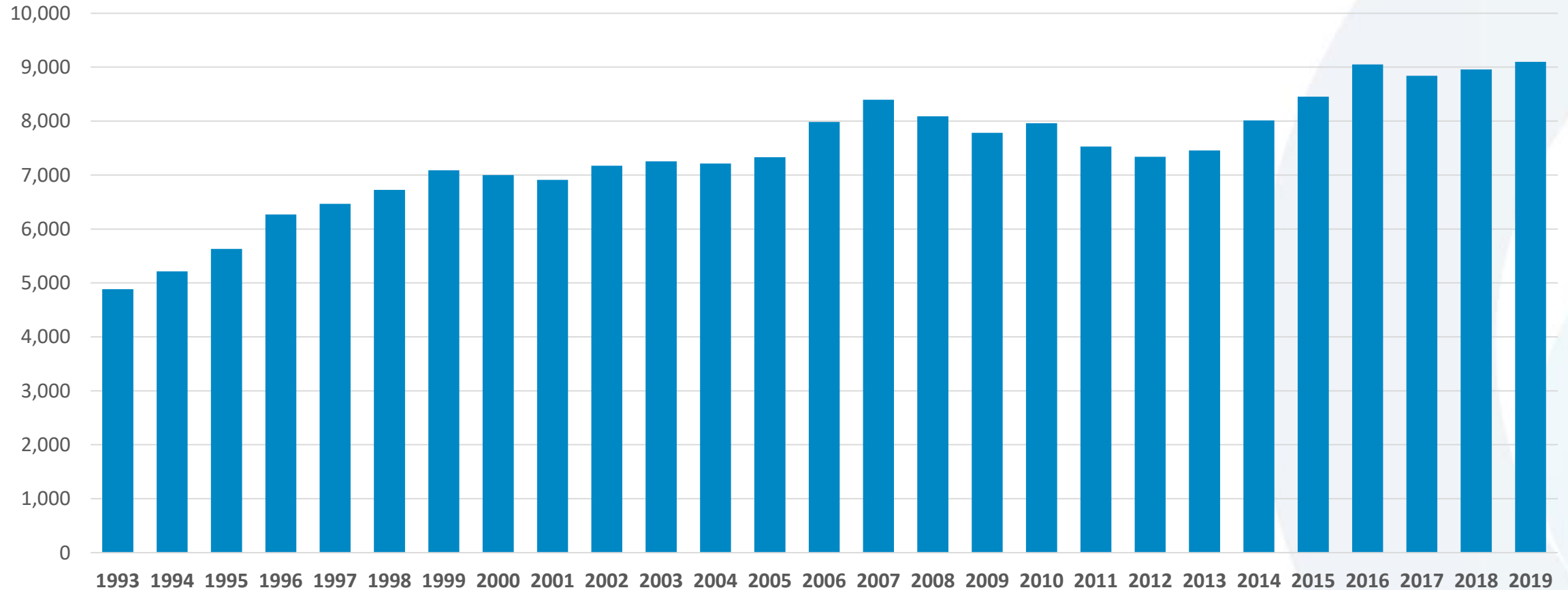
# Key Performance Indicators



TOP OF THE

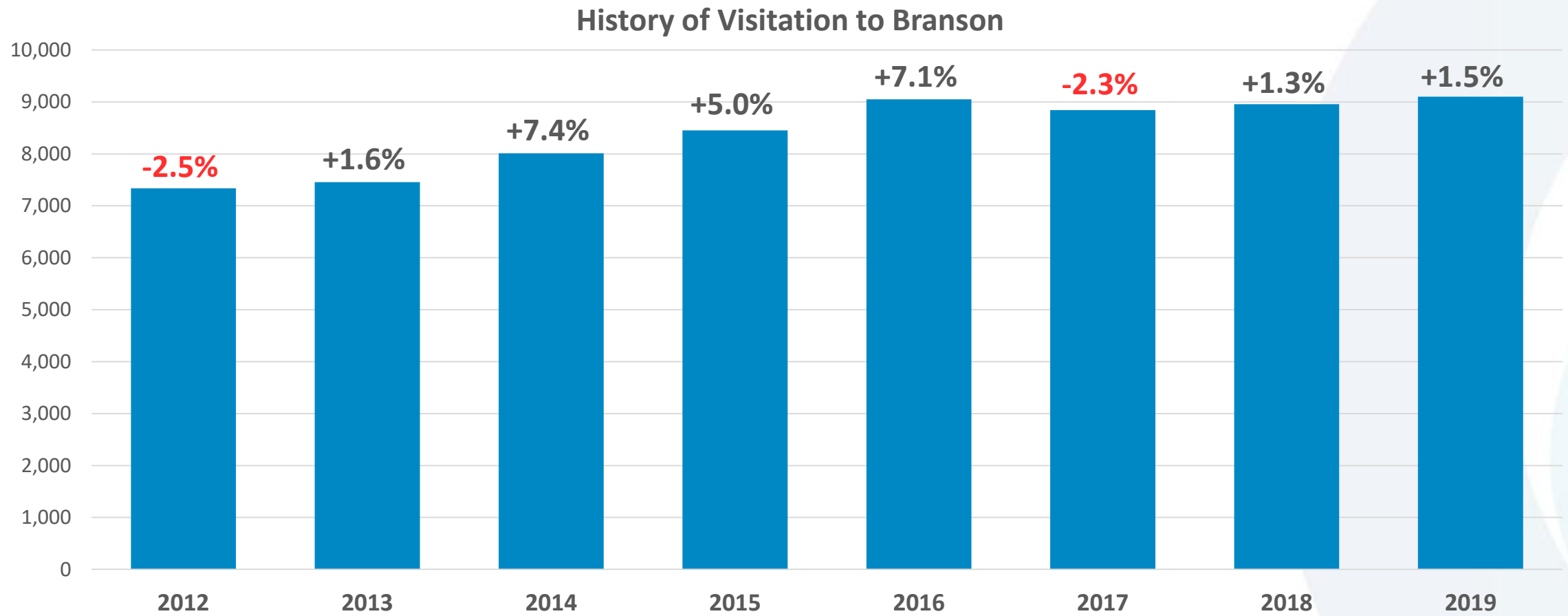
**2019 visitation hit 9.1 million\*, which is a record for Branson since measurements began in 1993.**

History of Visitation to Branson (000s)

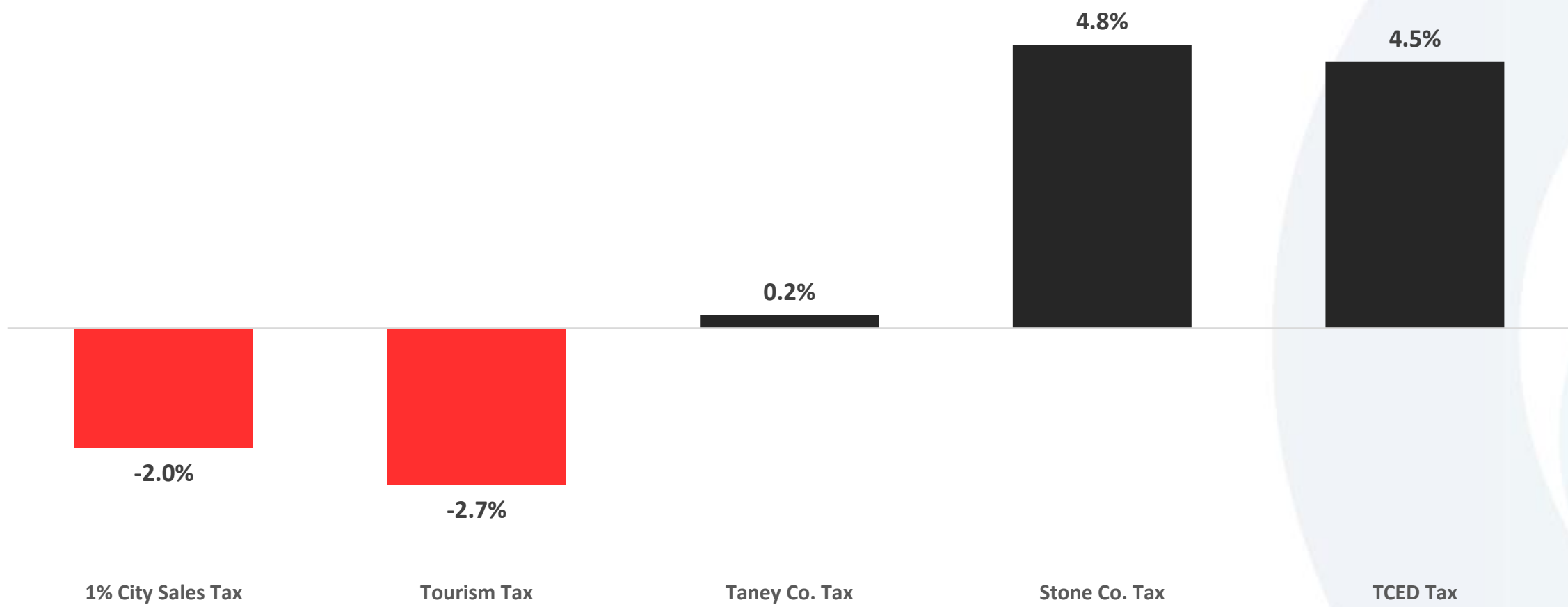


\*Assumes Base=7.0M (2000, DKSA)

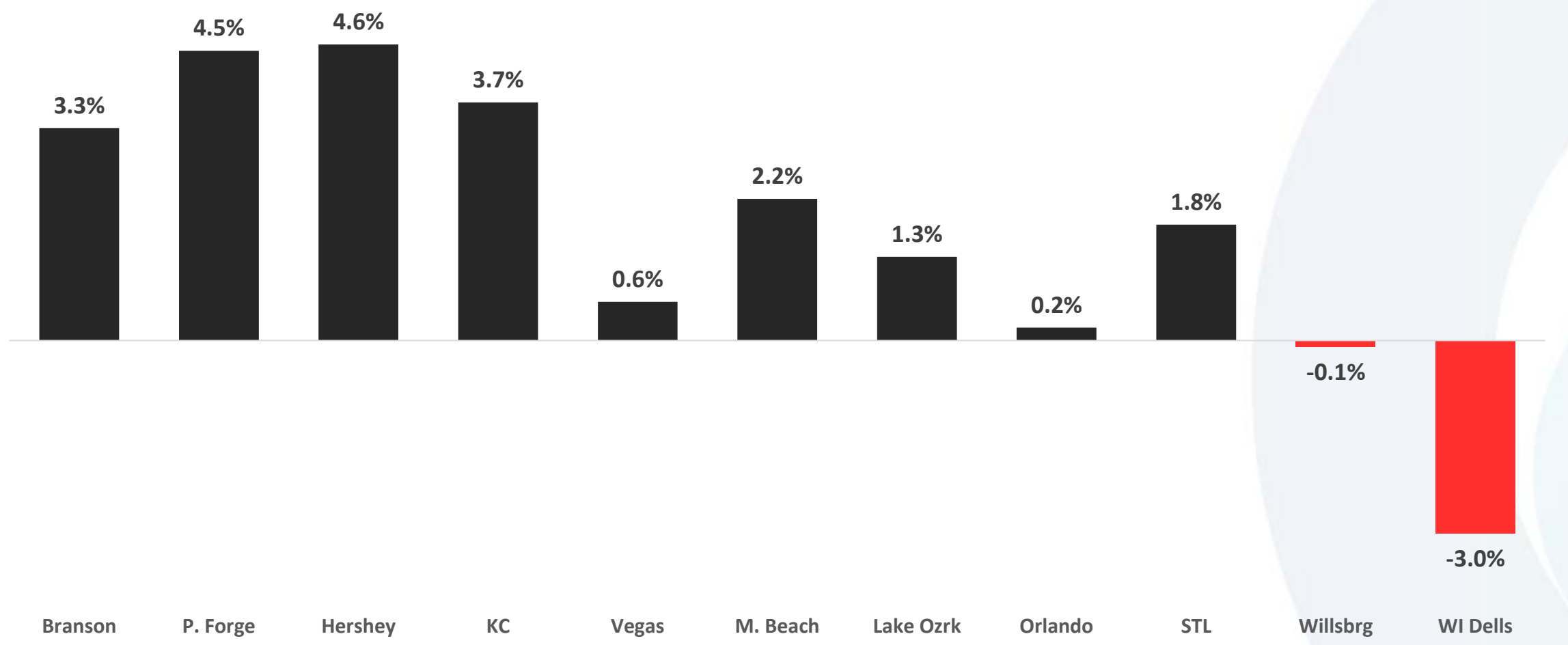
Since 2012, Branson has increased annual visitation 6 of the past 7 years which fueled a record year in 2019.



Branson’s 1% Sales Tax and Tourism tax revenues in 2019 were lower than last year’s, while all other tax sources experienced YOY growth.



According to STR\*, Branson’s room demand increased by 3.3% over last year, similar to increases seen in KC, Pigeon Forge and Hershey, PA.





Branson 2019 Visitor Profile Research

# Behavioral Profile





# BEHAVIORIAL PROFILE

## KEY PERFORMANCE INDICATORS



**51%**

of Branson's 2019 travelers  
were Repeat Visitors  
*+4.5pts*



**64 Days**

Decision Time  
*-4 Days*



**61%**

Net Promoter Score  
*+0 pts*

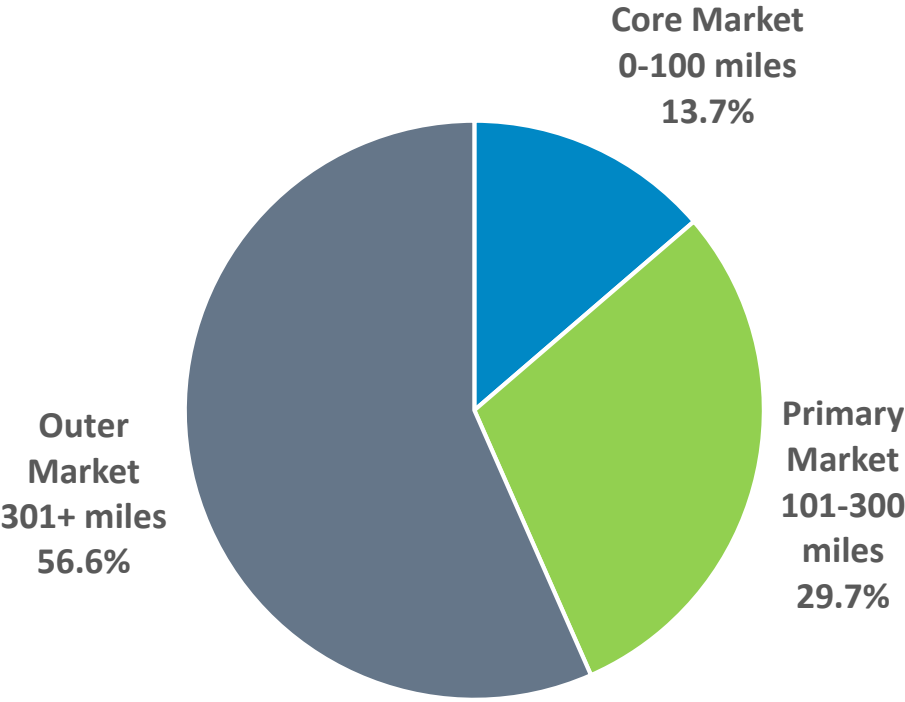


**88%**

Intend to return to Branson in  
the next 12 months  
*-1pt*

Branson continues to deliver a geographically diverse visitor profile. The Core Market (0-100 miles) saw a slight decline, while the Primary and Outer markets saw increases compared to 2018.

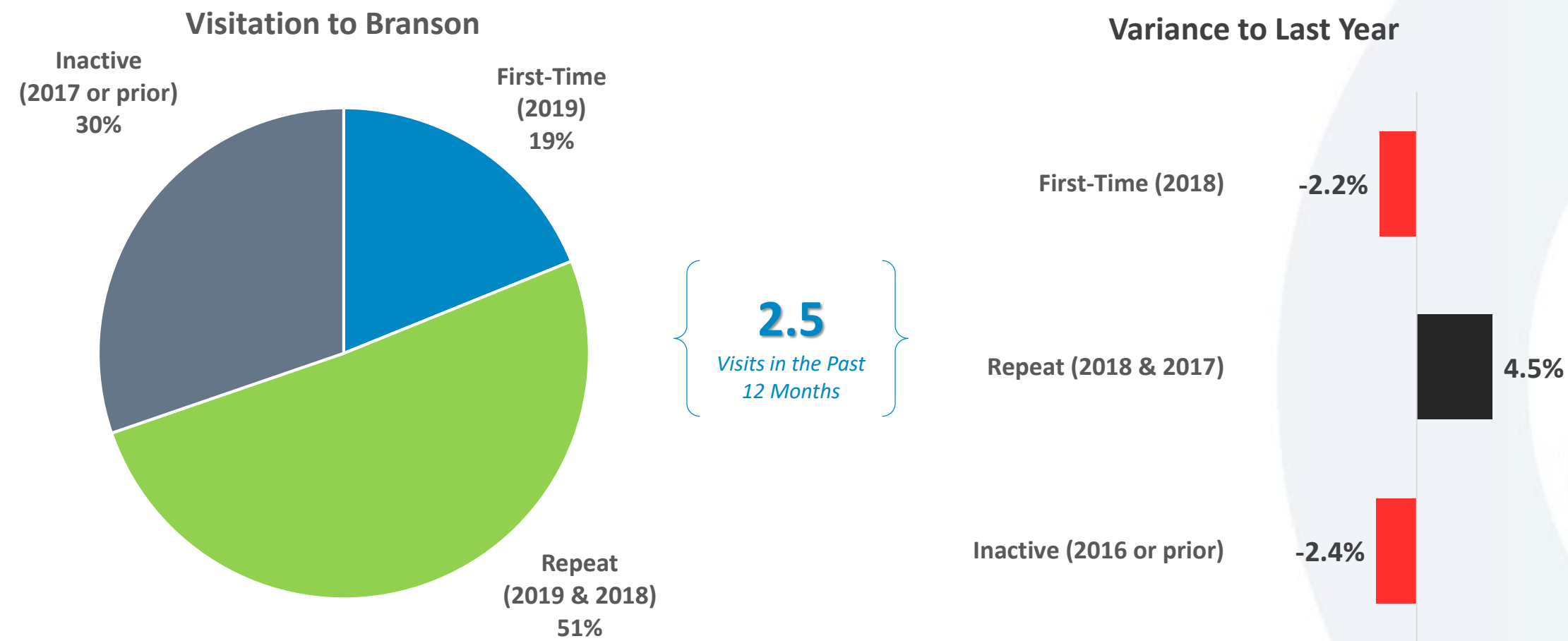
Distance Traveled to Branson



Variance in Estimated Visitation to 2018



# Repeat visitation increased once again in 2019 (+4.5pts), marking a 9-point increase since 2017.



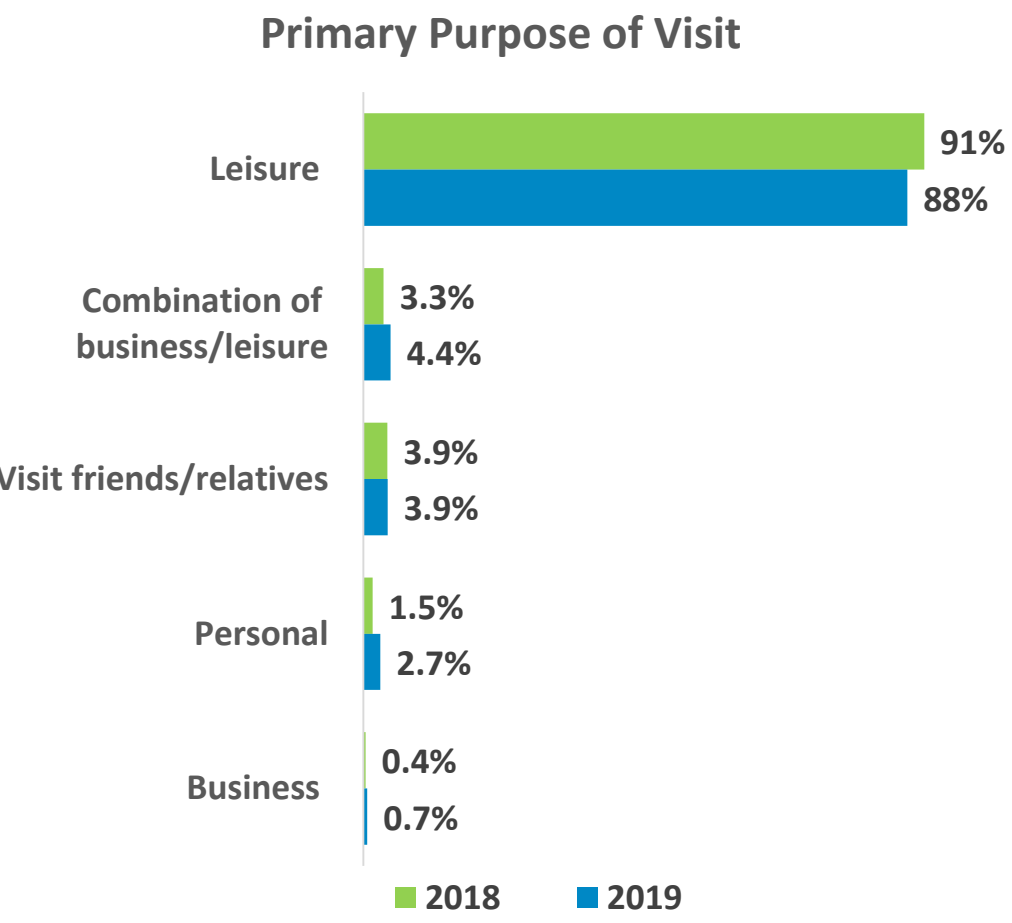
Q4: Which of the following best describes this visit to the Branson/Lakes area?  
Q5: How many times have you visited Branson in the past 12 months - including this visit?



# Importance of Balance Between 1<sup>st</sup> Time & Repeat Visitation

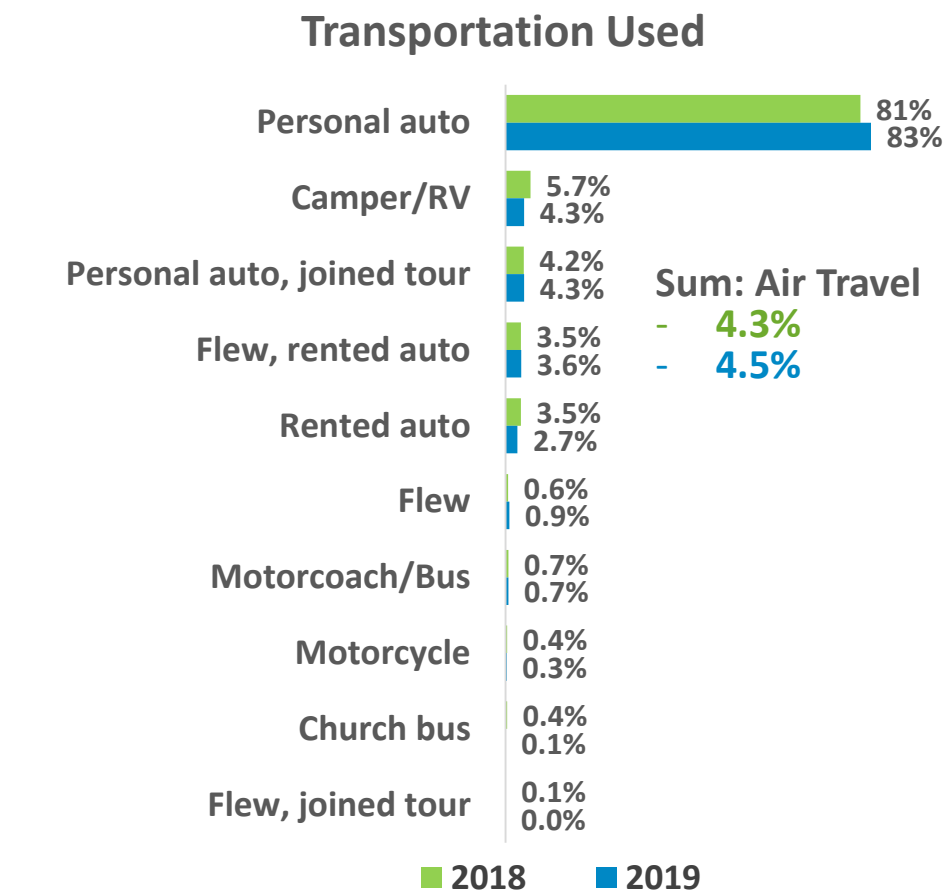
- William Shakespeare once penned the line, “nothing is either good or bad, but thinking makes it so”....and the same is somewhat true for first-time vs. repeat visitation. That is, both are necessary for Branson’s short-term and long-term success.
- First-timer visitors are important to Branson because... not only do they tend to stay longer and spend more money per visit, but they also help fuel the pipeline for the future. And, given that some travelers “age-out” and stop traveling every year, it is important for Branson to find new visitors to convert and take the place of those who disengage and/or stop traveling. Therefore, first-time visitation is important as a leading indicator for Branson’s future brand health.
- Repeat visitation, however, is important for the success of today. Repeat visitors represent the lowest hanging fruit that can more easily be persuaded to visit again and visit more often. That is, they are easier to reach and less expensive to convert. While they tend to spend somewhat less money per individual trip, their frequency of return causes their lifetime value to be much higher than first-time visitors. As a result, repeat visitation is a better lagging indicator of annual performance in any give year.
- The ideal balance for Branson appears to be somewhere around 20%-25% new visitors per year with 75%-80% repeat visitors. In 2019, repeat visitation topped 80% for the first time in a while, and Branson appears to have reached a new performance record.
- That is great news! But, we must all keep our eyes on that ratio of first-time visitors as a leading indicator of the health of Branson’s future 3-5 years from now.

# Leisure travel continues to be the primary purpose of visitation to Branson. And, with more repeat visitation, decision time shortened by 4 days on average.

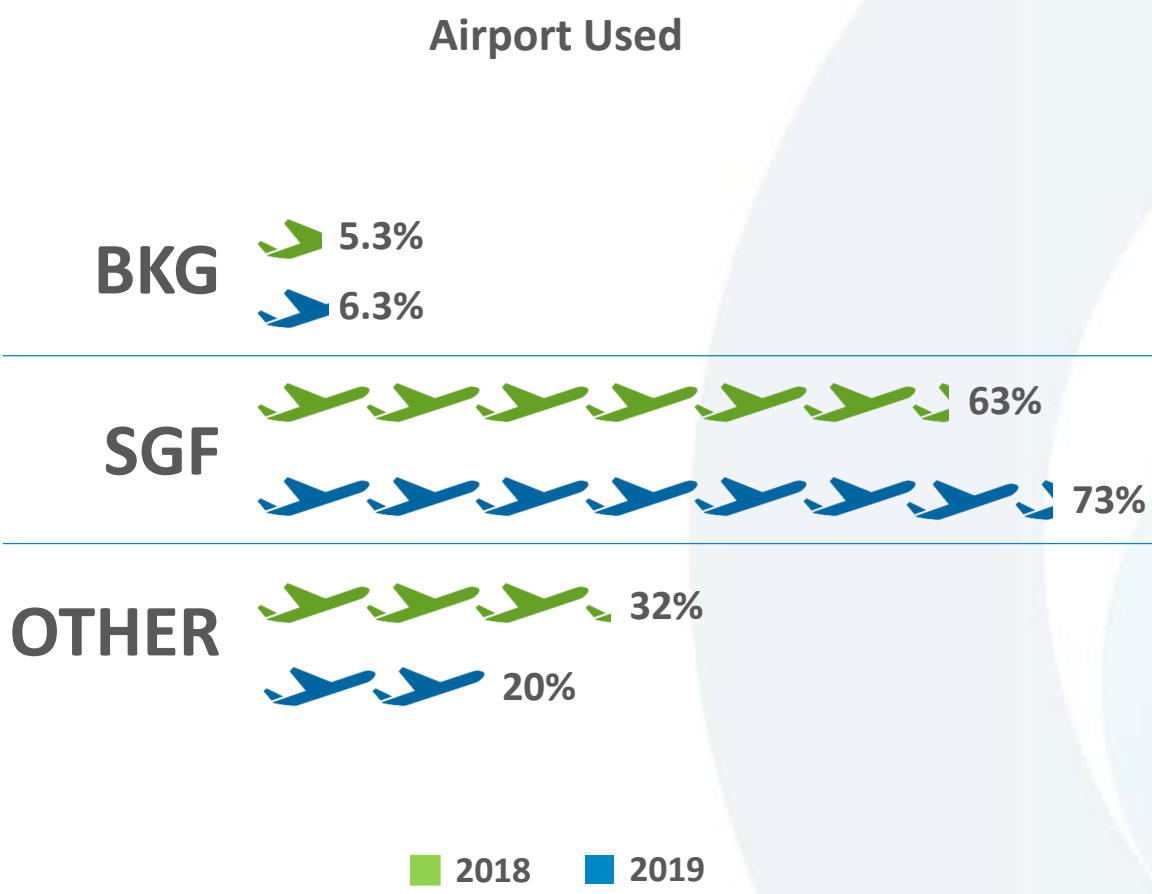


Q6: Which of the following was your primary purpose for this visit?  
Q7: How many days in advance did you begin to consider making this trip to the Branson/Lakes area?

Personal autos remain the most popular mode of transportation. And, for those who fly, the Springfield-Branson National Airport remained the most popular airport.



RESPONDENT BASE: ALL RESPONDENTS | N=2,185



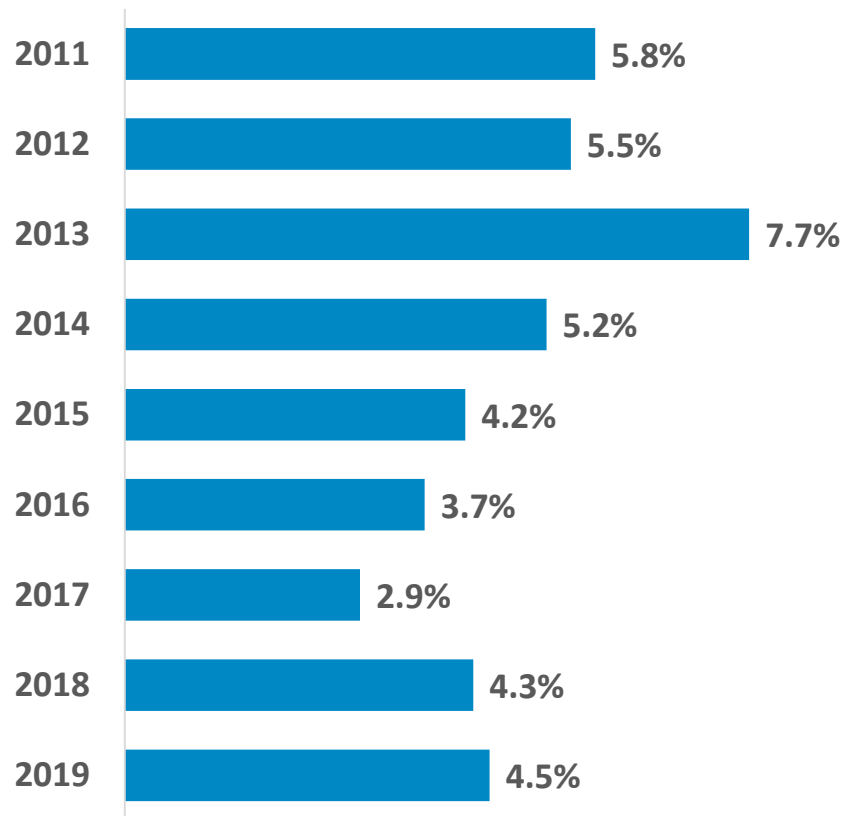
RESPONDENT BASE: RESPONDENTS WHO FLEW TO THE AREA | N=88

Q10: How did you travel to the Branson/Lakes area on this most recent visit?  
Q11: Which airport did you use?



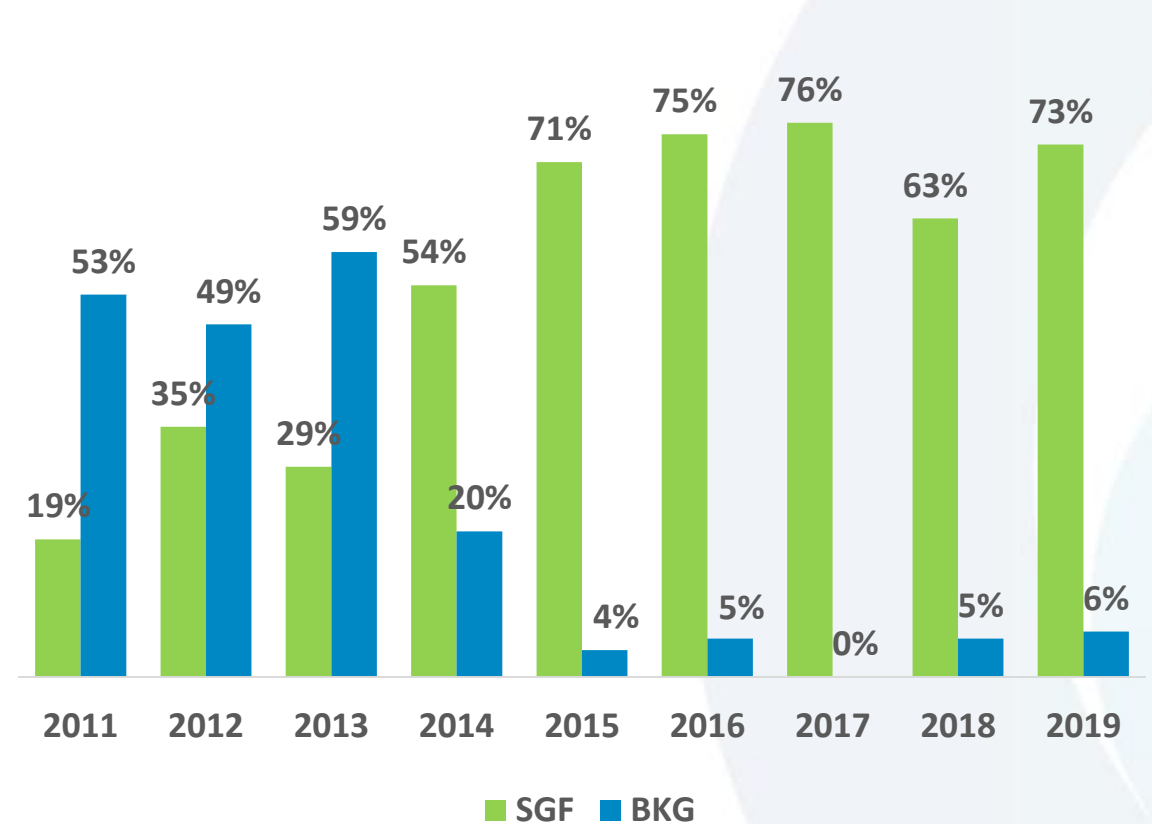
# Air travel to Branson inched upward in 2019 as did those using the Branson airport. However, most air travelers continue to use SGF.

History of Air Travel to Branson



RESPONDENT BASE: ALL RESPONDENTS | N=2,185

Airport Used

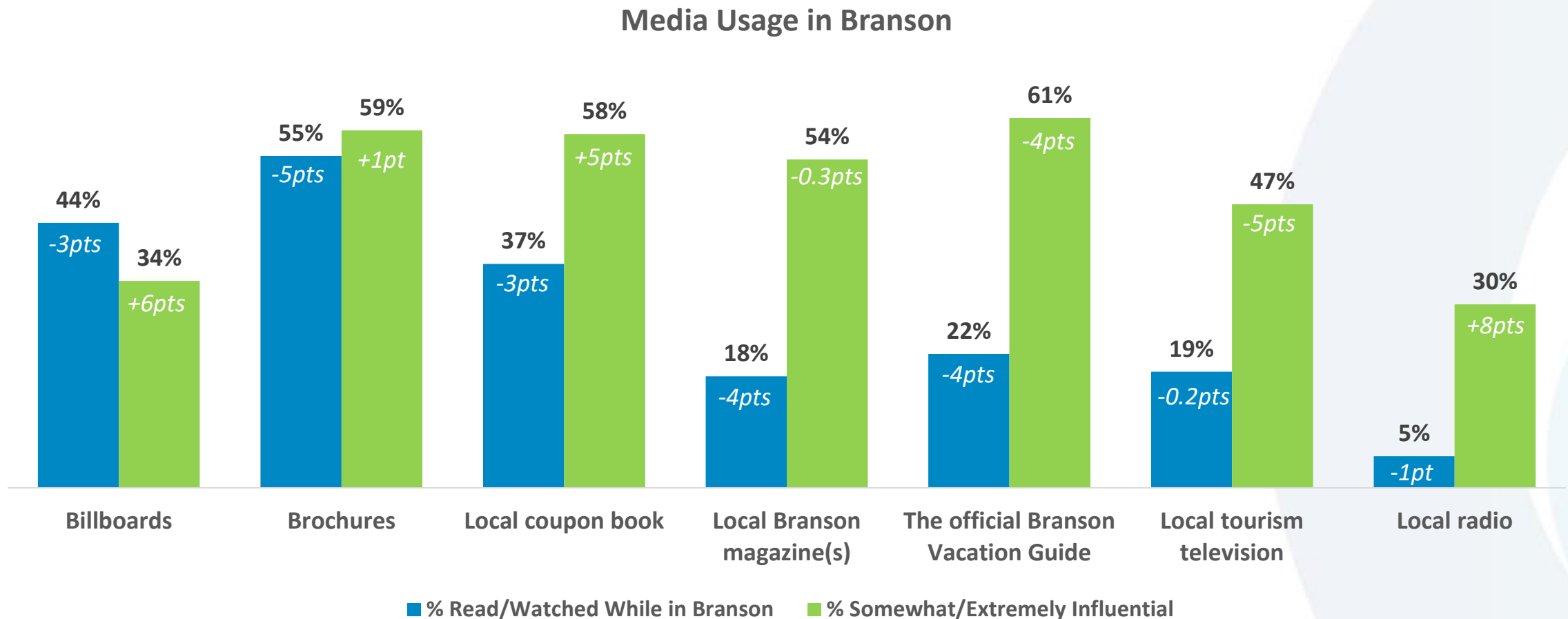


RESPONDENT BASE: RESPONDENTS WHO FLEW TO THE AREA | N=88

Q10: How did you travel to the Branson/Lakes area on this most recent visit?

Q11: Which airport did you use?

With the increase in repeat visitation it is little surprise that in-market media usage declined a bit. However, overall usage remained consistent (81%) and the influence of those media was higher in several cases.

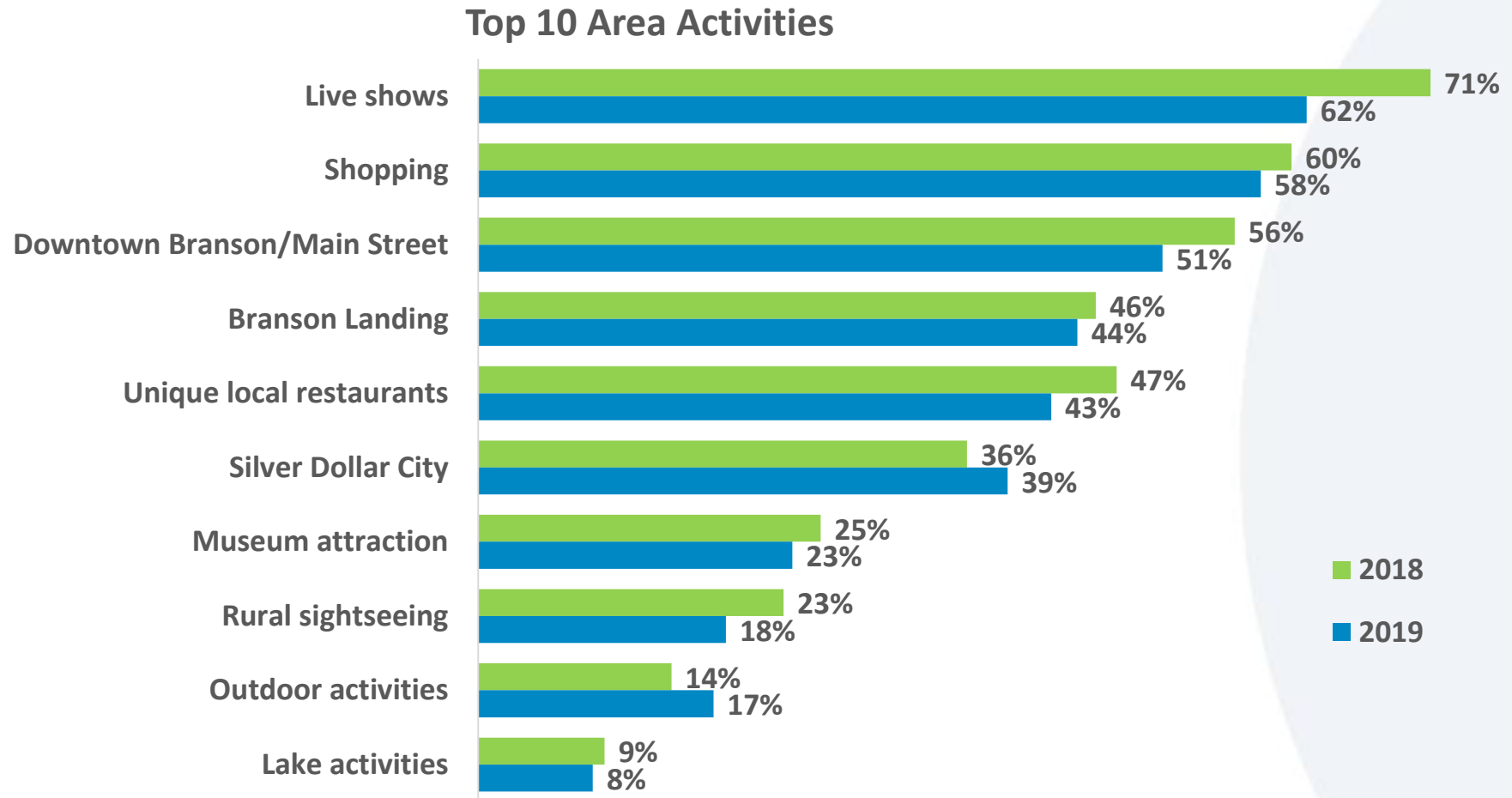


White numbers represent variance to 2018

Q12: Which of the following local media, if any, did you read or watch during this most recent visit in Branson? Please select all that apply.

Q13: Using the scale provided, please rate how influential each of these media were at persuading you to visit specific shows, attractions, restaurants, etc. (5-pt. scale)

The most popular area activity categories continue to be Live Shows, Shopping and Downtown Branson. Although, these activities each dipped in 2019 while Silver Dollar City and Outdoor Activities increased.

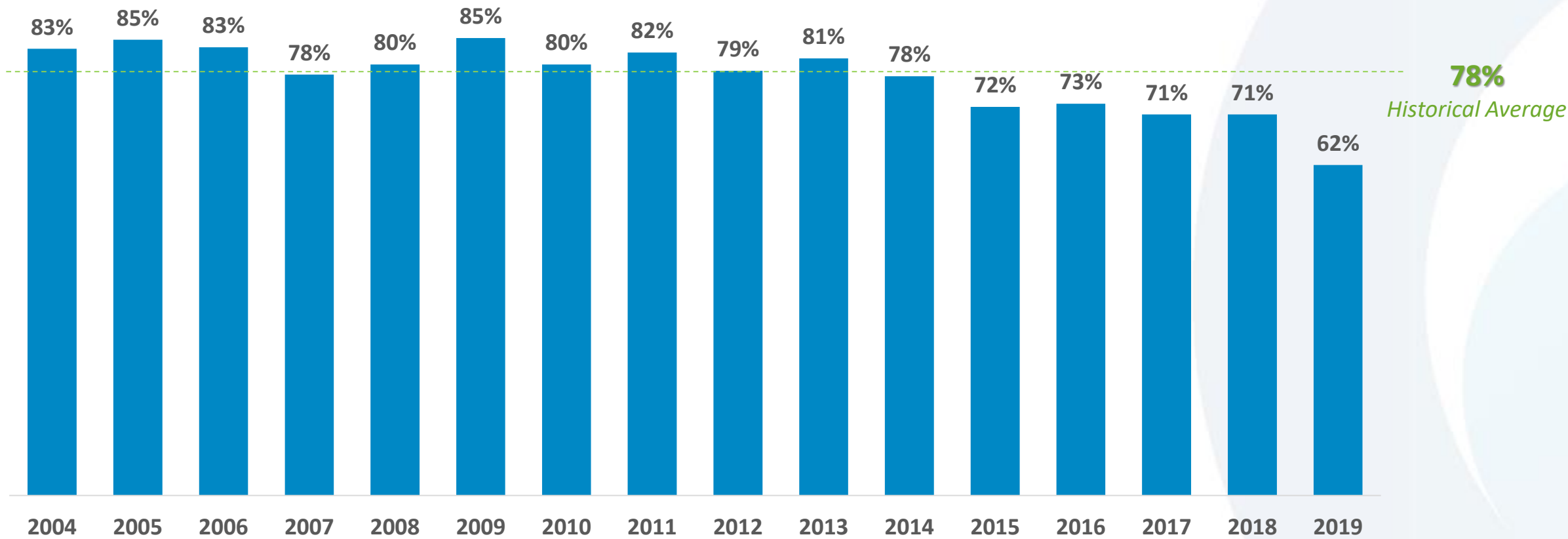


Q14: Did you do any of the following on this trip to the Branson/Lakes area...? Please select all that apply.



Live Show participation among Branson visitors fell to 62% in 2019, marking the lowest ratio of show visitors ever recorded.

Live Show Participants



Live Shows (as a category), however, remain Branson’s biggest functional driver followed by Silver Dollar City (specific brand) and Shopping in general.

Activities That Were a Primary Reason for Visiting Branson



47%  
Live Shows  
-10 points



32%  
Silver Dollar City  
+1 point

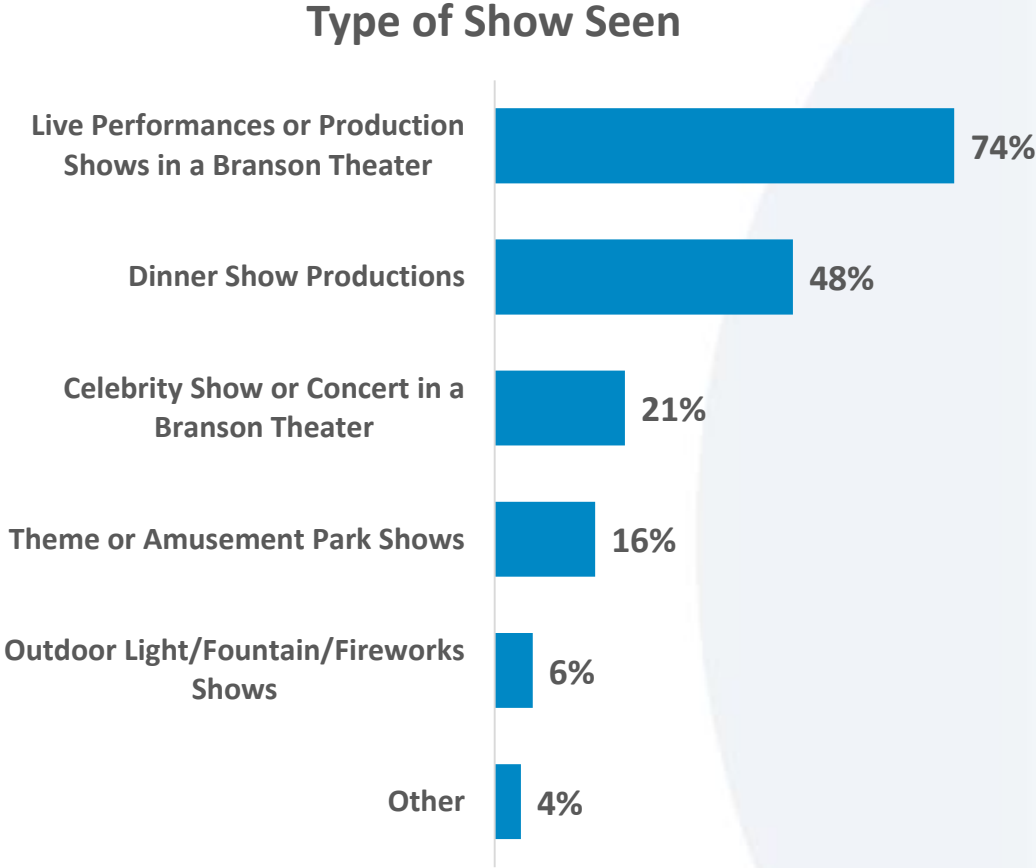
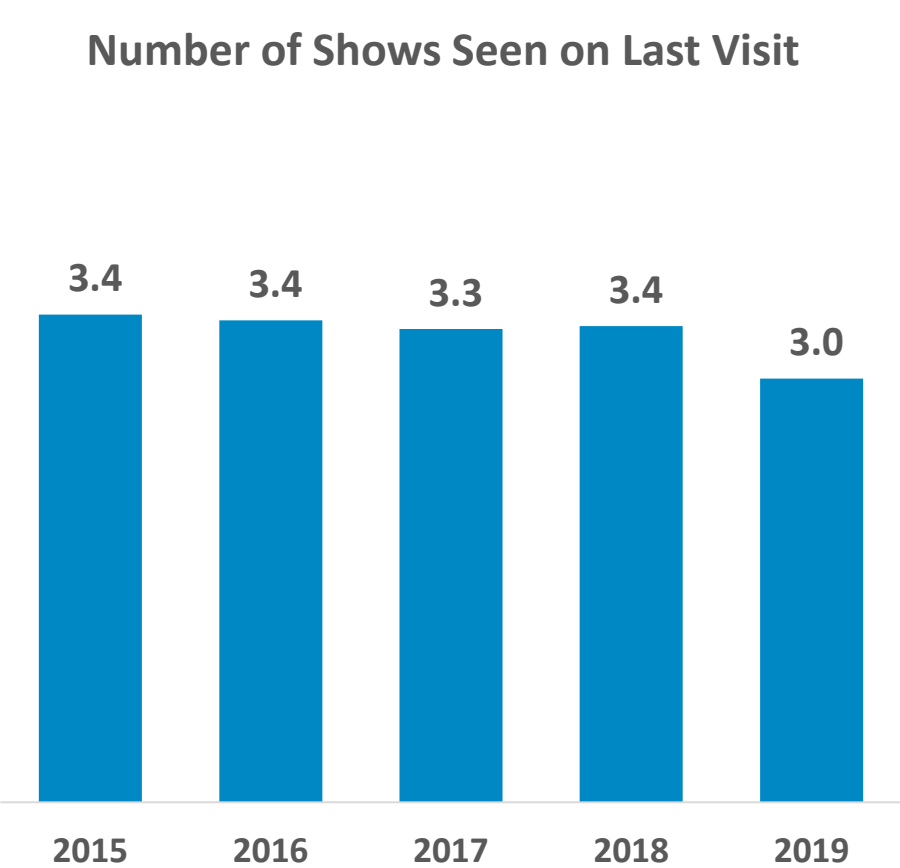


19%  
Shopping  
+4 points

Gray numbers represent variance to 2018

Q15: Which of these activities, if any, were among your primary reasons for visiting Branson on this trip? Please select up to your top 3.  
Q16: What is the total number of Branson shows you saw on this trip?

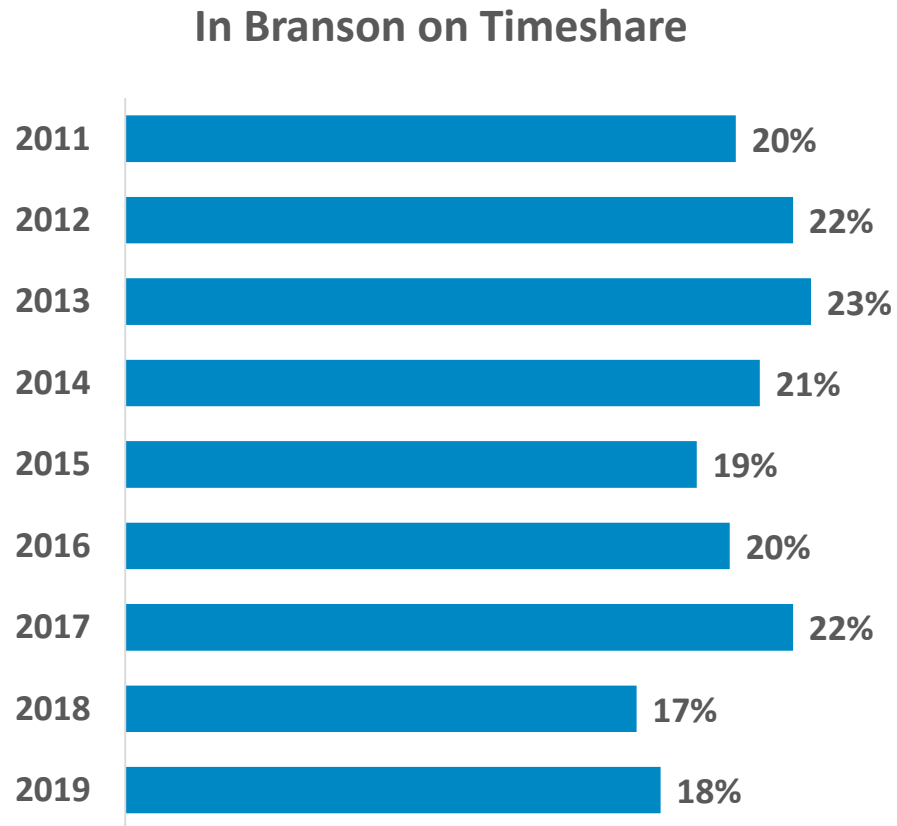
The number of Live Shows seen per visit has hovered around 3 shows for several years. This year, a new question was added and we now know that the majority of shows are live performances in a theater or a dinner show production.



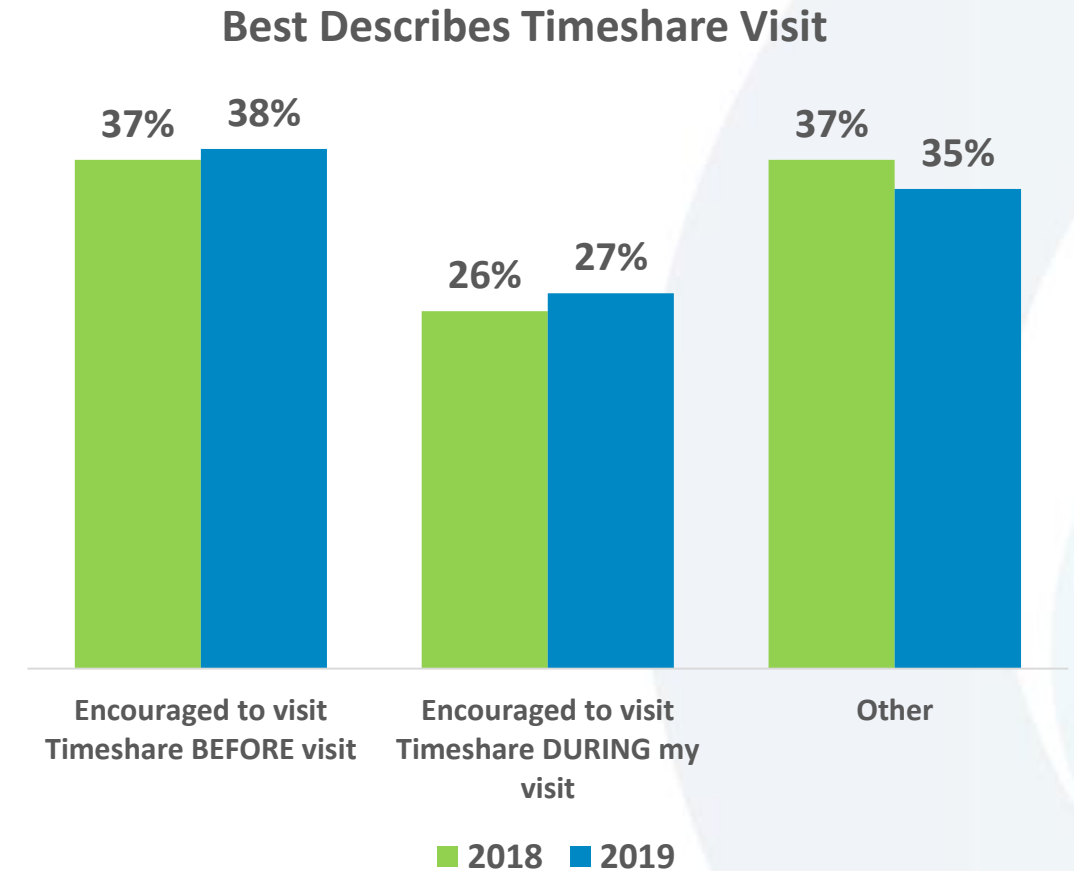
Q15: What is the total number of Branson shows you saw on this visit?  
Q16: How many of these [x] would you say fall into the following categories?



**Timeshare visitation was on par with last year, and closer to the Historical Average of 20%. More than one-third continue to be encouraged to visit a timeshare before they come to the area.**



RESPONDENT BASE: ALL RESPONDENTS | N=2,185

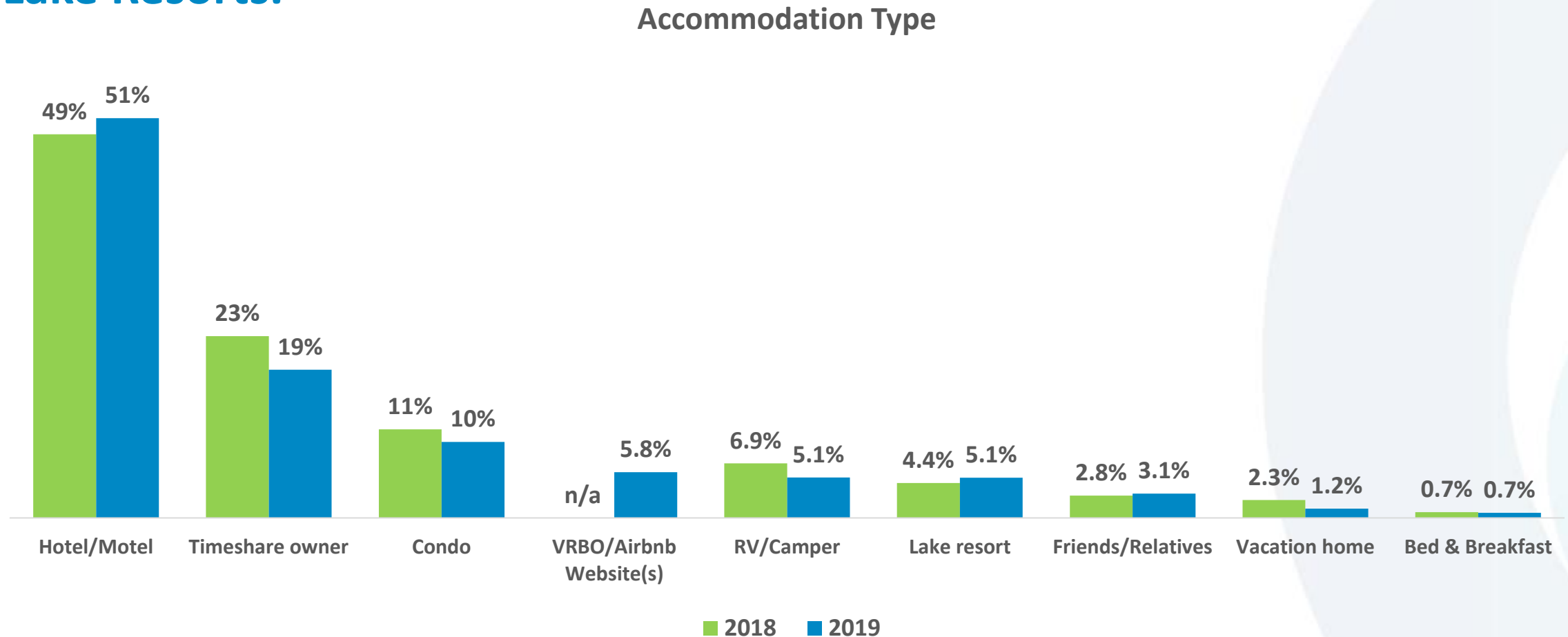


RESPONDENT BASE: VISITED AS A PART OF A TIMESHARE | N=298

Q17: On this trip, did you visit the Branson/Lakes area as part of a timeshare or vacation club promotional visit?

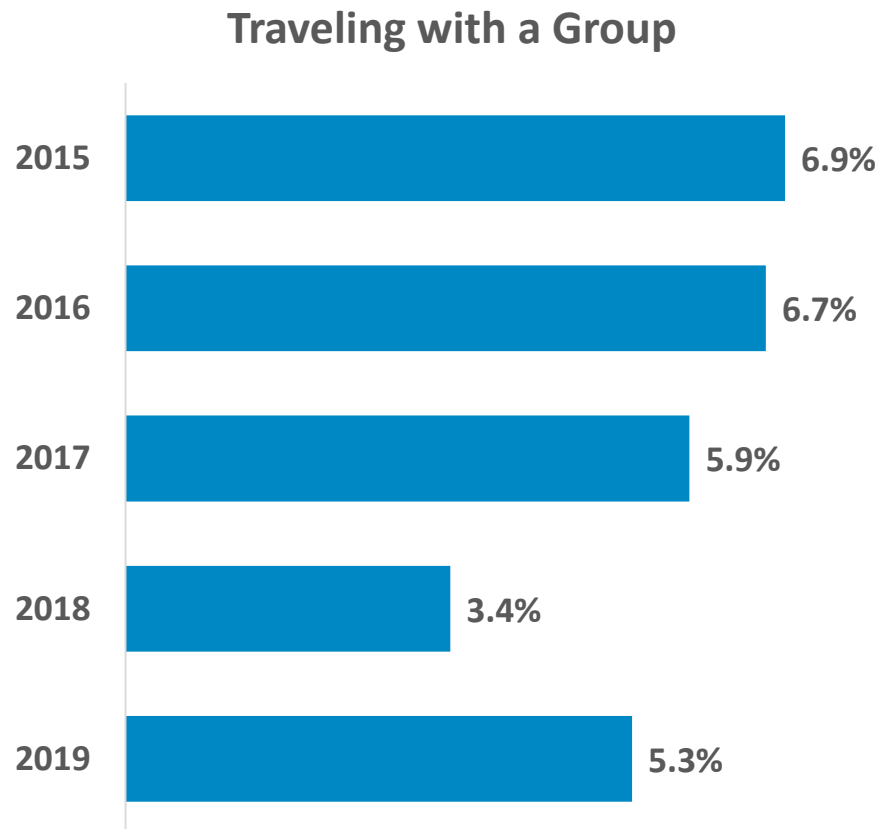
Q18: Which of the following best describes your visit:

Overnight visitors were most likely to stay overnight in area Hotels/Motels and experienced a 2-point YOY increase. A new category, VRBO/Airbnb, delivered a strong 6% share, similar to RV/Camper and Lake Resorts.

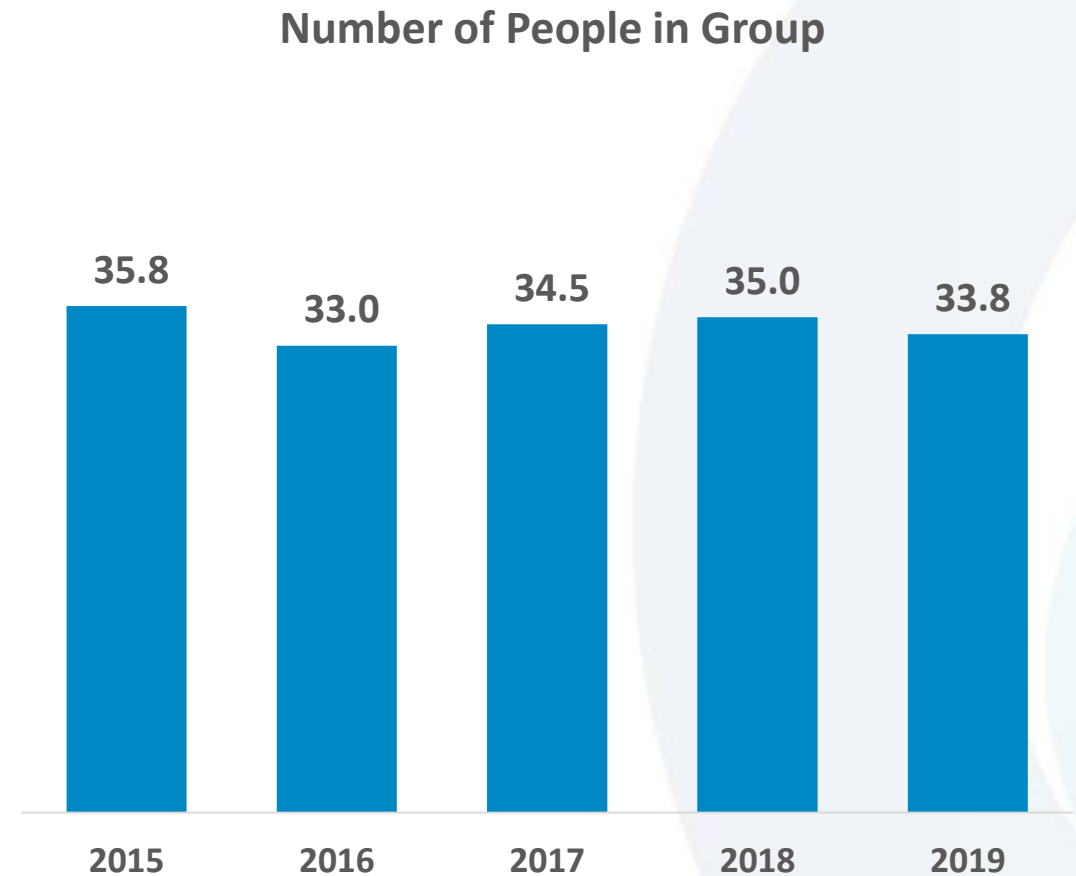


Q20: In what type of accommodations did you stay on this visit?

**Group travel rebounded to 5.3% in 2019 (up nearly 2 points), while the number of people per group slipped slightly (-1%).**



RESPONDENT BASE: ALL RESPONDENTS | N=2,185



RESPONDENT BASE: GROUP TRAVELERS | N=98

Q24: On this trip to the Branson/Lakes area, were you traveling as part of an organized tour, group activity, or event?

Q25: Approximately how many people were in your total group?

# Overall, Branson visitor parties spent more money in the area this year, marking the highest level of spending recorded since the Great Recession.



## Party Trip Spending \$982

<u>Past Party Trip Spending</u>
2018 - \$972
2017 - \$946
2016 - \$911
2015 - \$882
2014 - \$914
2013 - \$985
2012 - \$935

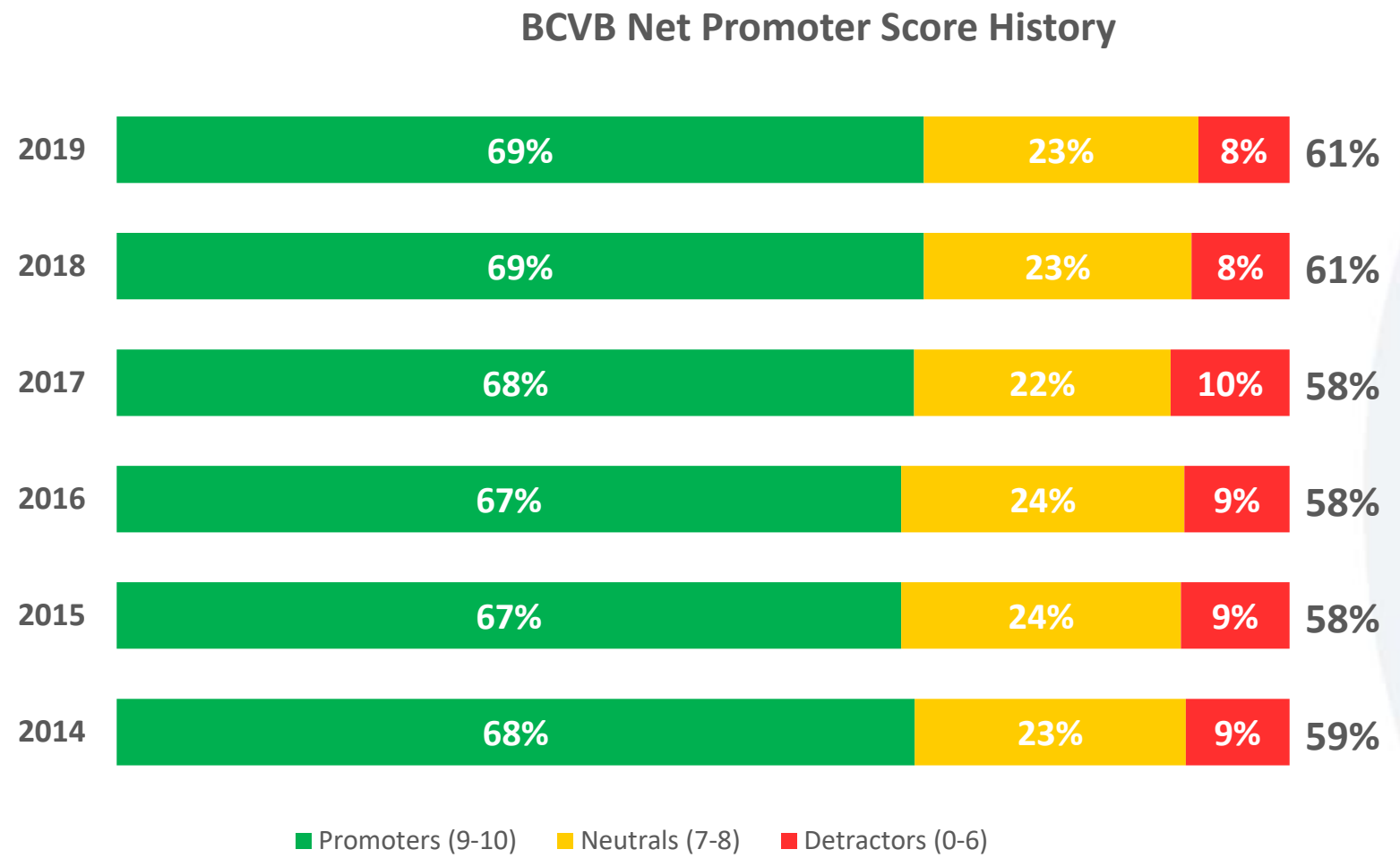


## Per Person Trip Spending \$306

<u>Past Per Person Trip Spending</u>
2018 - \$315
2017 - \$279
2016 - \$264
2015 - \$252
2014 - \$276
2013 - \$273
2012 - \$266

Q31: Approximately how much money did your party spend on lodging, food, entertainment, shopping and other activities in the Branson area on this trip - not including travel expenses to and from Branson?

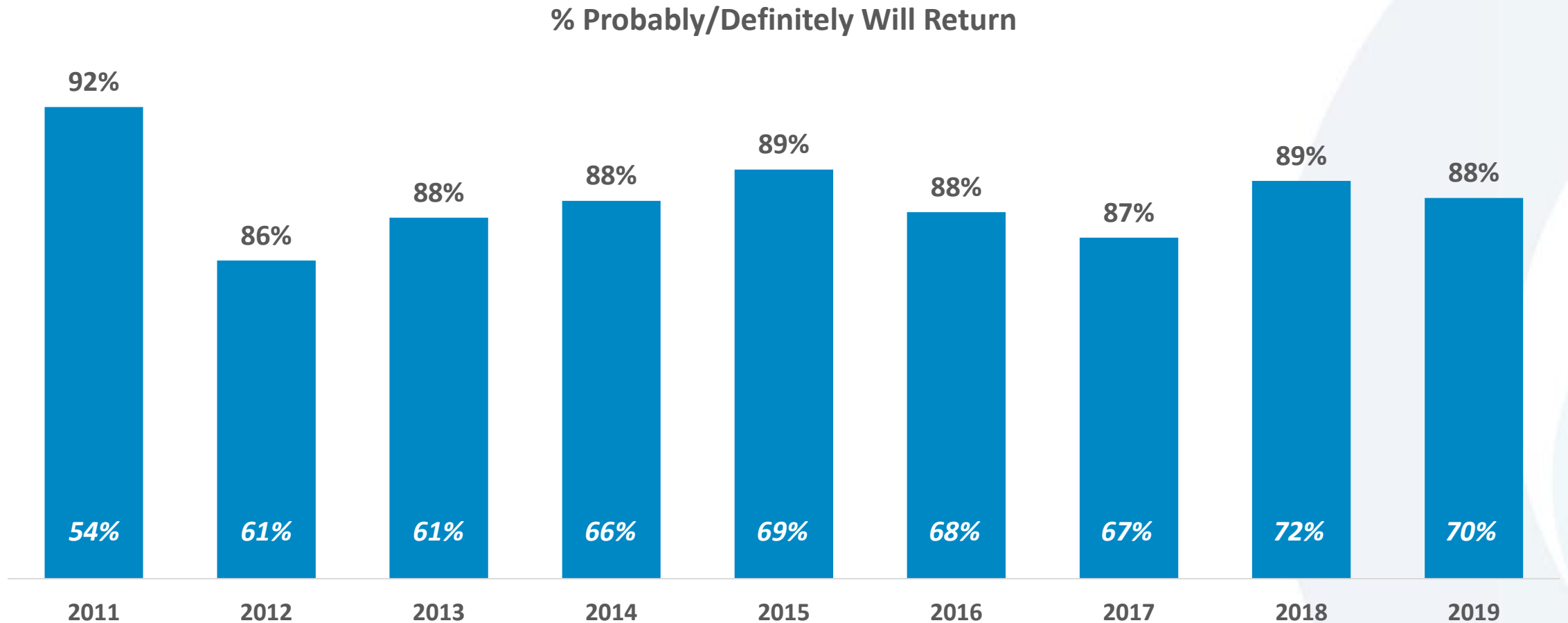
Branson’s Net Promoter Score remained on par with last year’s record-breaking 61%, indicating the area’s consistency in providing a quality visitor experience.



Q28: Using the scale provided, please indicate how likely you would be to recommend the Branson area to friends and family members. (11-pt. scale)  
Q29: Please explain why you chose that score for likelihood to recommend the Branson area.



## Intent to return (Top 2 Box) to Branson remained on par with last year and with the Historical Average of 89%.



*White numbers represent % Definitely Will Return*

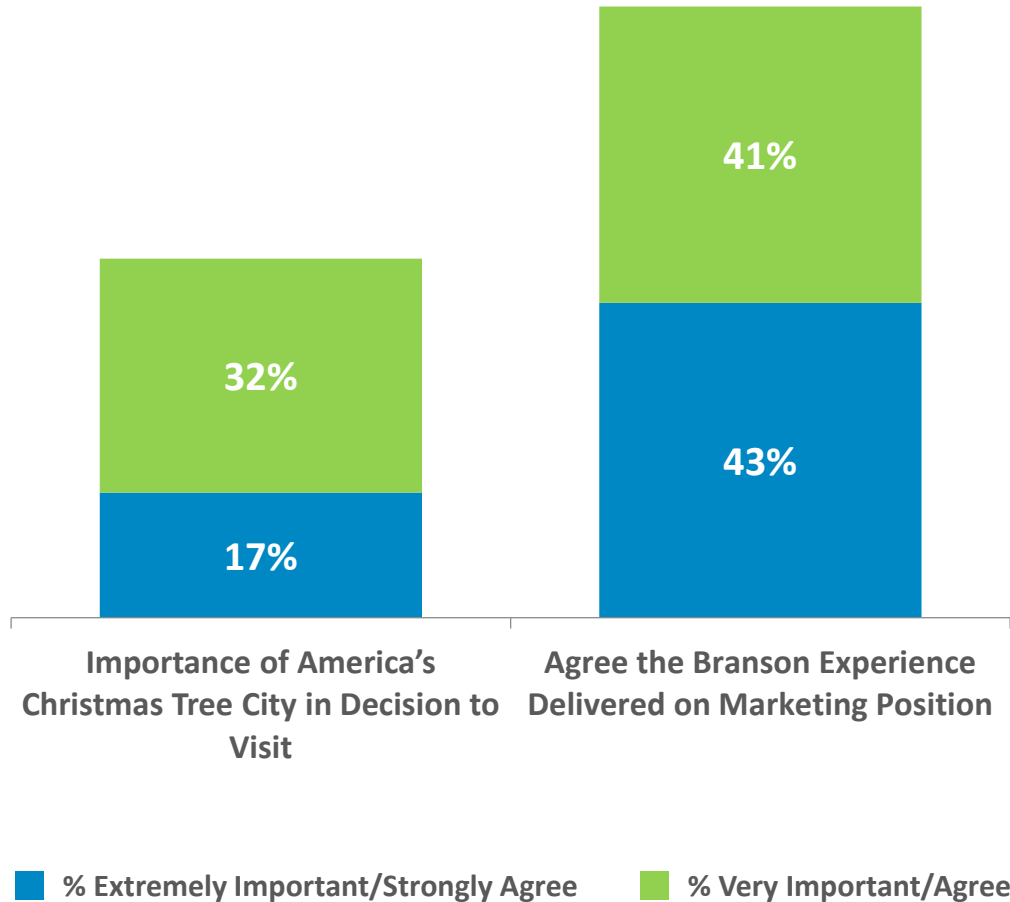
Q30: Using the scale provided, please indicate how likely are you to return to the Branson/Lakes area? (5-pt. scale)

**Branson visitors were somewhat younger in 2019—the youngest they’ve been in the past 10 years. This is driven in part by a notable increase in the number of family visitors—also the highest ratio in the past 10 years.**

	2012	2013	2014	2015	2016	2017	2018	2019
Average Visitor Adult Age	59	58	59	59	56	56	58	55
% Under 12	9%	9%	9%	10%	14%	12%	12%	15%
% 12-17	5%	5%	5%	5%	5%	5%	6%	7%
% 18-34	8%	8%	9%	9%	11%	12%	9%	12%
% 35-54	20%	20%	18%	18%	22%	22%	20%	21%
% 55+	59%	57%	59%	58%	49%	49%	53%	46%
Families	32%	33%	34%	39%	41%	40%	43%	50%
Adults	68%	67%	66%	61%	59%	60%	57%	50%
HH Income	\$81.2k	\$81.2k	\$82.9k	\$81.2k	\$81.6k	\$82.7k	\$84.7k	\$87.9k
% from Beyond 300 Miles	54%	59%	57%	56%	56%	56%	56%	57%

# America's Christmas Tree City

## Importance of and Satisfaction with America's Christmas Tree City



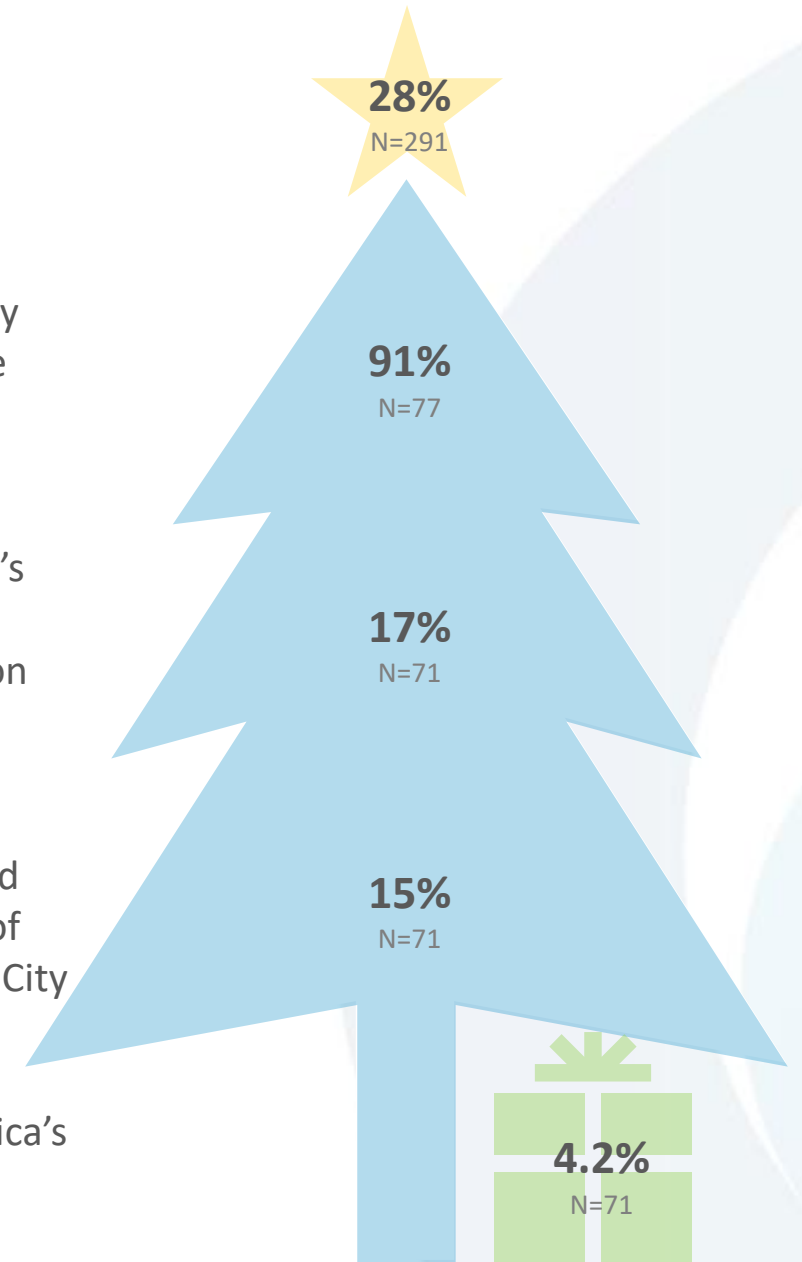
Aware of America's Christmas Tree City

See/Visit/Engage in Any Special Christmas Tree Displays

Importance of America's Christmas Tree City in Decision to Visit Branson

Would Not Have Visited Without the Addition of America's Christmas Tree City

Derived Impact\* of America's Christmas Tree City



Festival Questions: participation, awareness, would not have visited without festival addition, importance of festival addition, satisfaction with festival, importance of festival in decision to purchase Season Pass, intent to visit

\*Derived Impact is calculated based on the awareness, participation and importance of the addition.

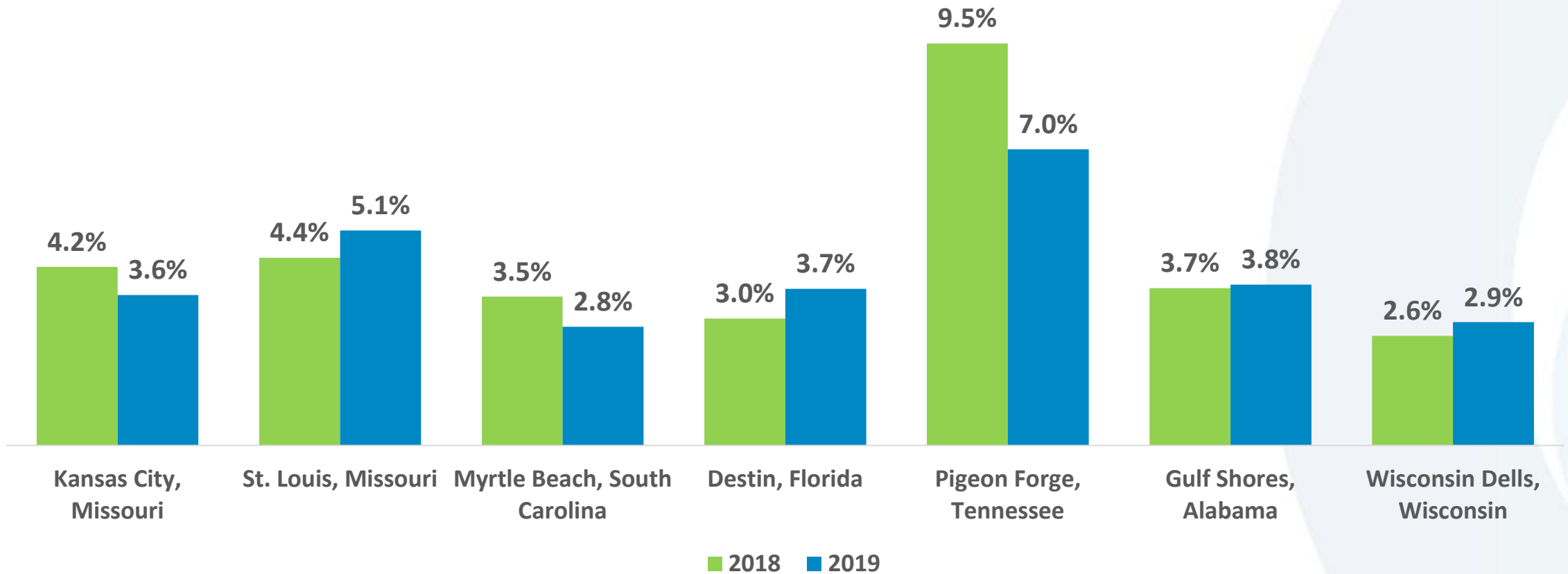
Branson 2019 Visitor Profile Research

# Travel Planning & Future Experiences



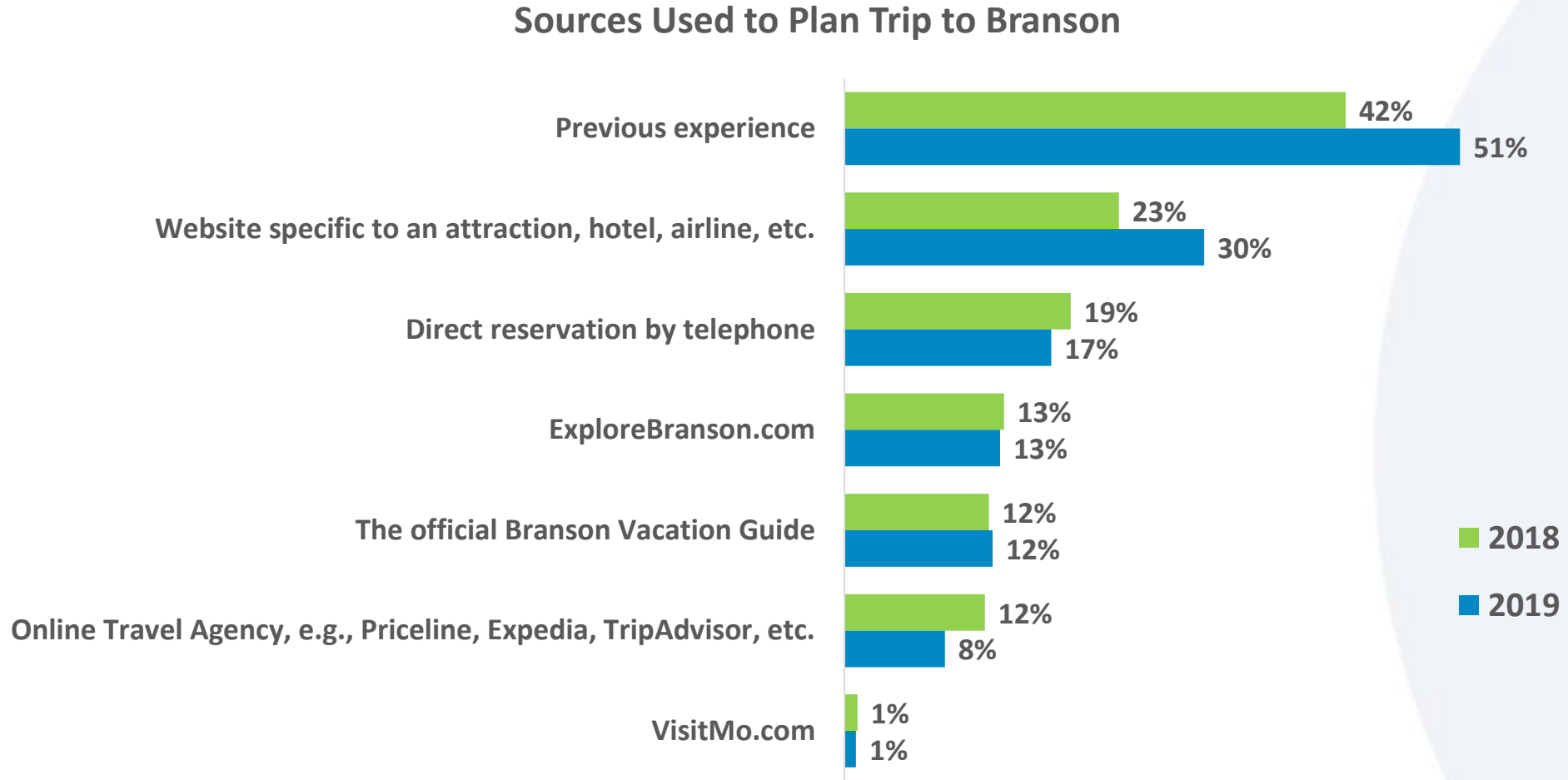
**Most travelers did not consider other destinations when considering Branson (72%). Those who did were most likely to consider Pigeon Forge or St. Louis, both of which saw a decline in consideration.**

**Destinations Considered When Planning Branson Trip**



Q3: When making your decision to visit Branson, which other destinations were considered? Please select all that apply.

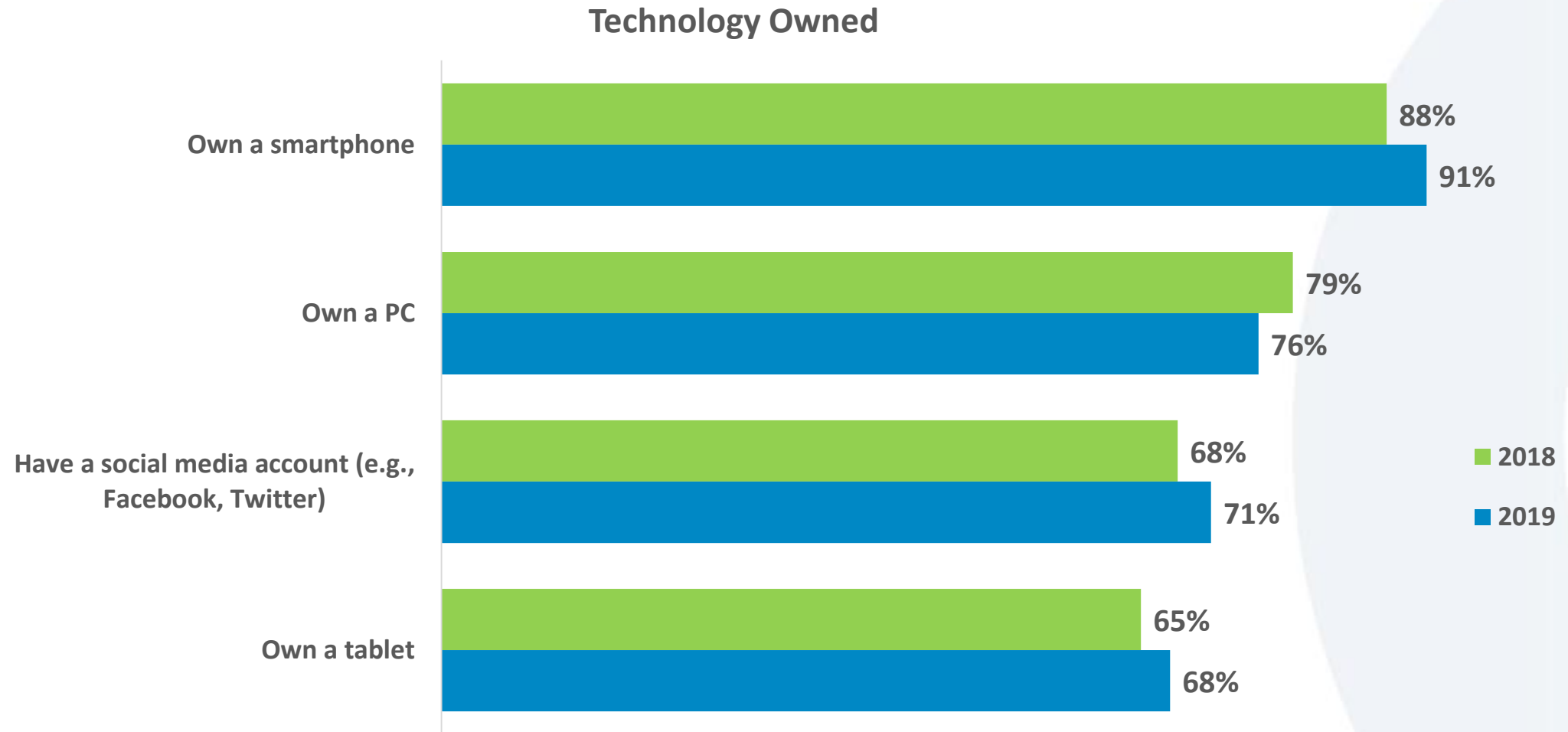
**Previous experiences and websites are still the most common sources used to plan trips to Branson—both of which saw significant increases compared to last year.**



Q8: Which of the following sources, if any, did you use to plan your trip to Branson? Please select all that apply.

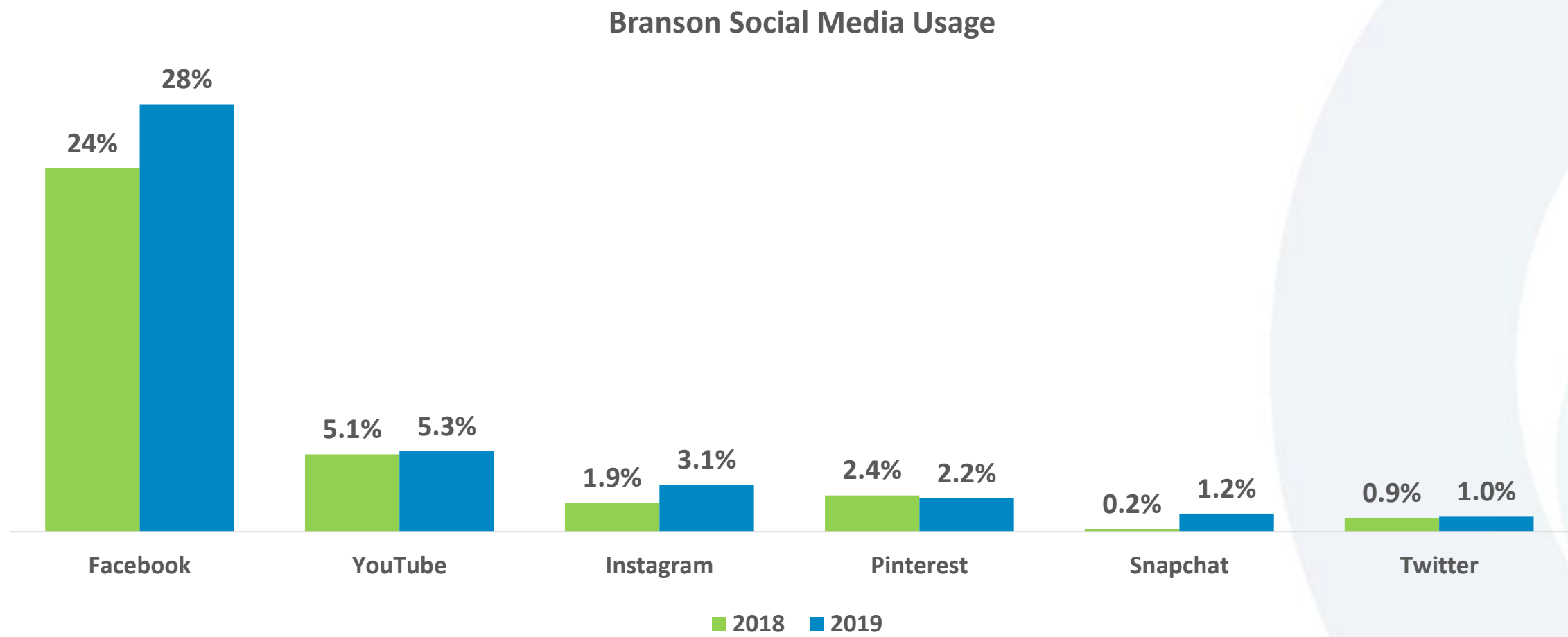


# Ownership of smartphones, social media and tablets all increased this year while ownership of desktop PCs declined.



Q32: Which of the following do you own, use or do: Please select all that apply.

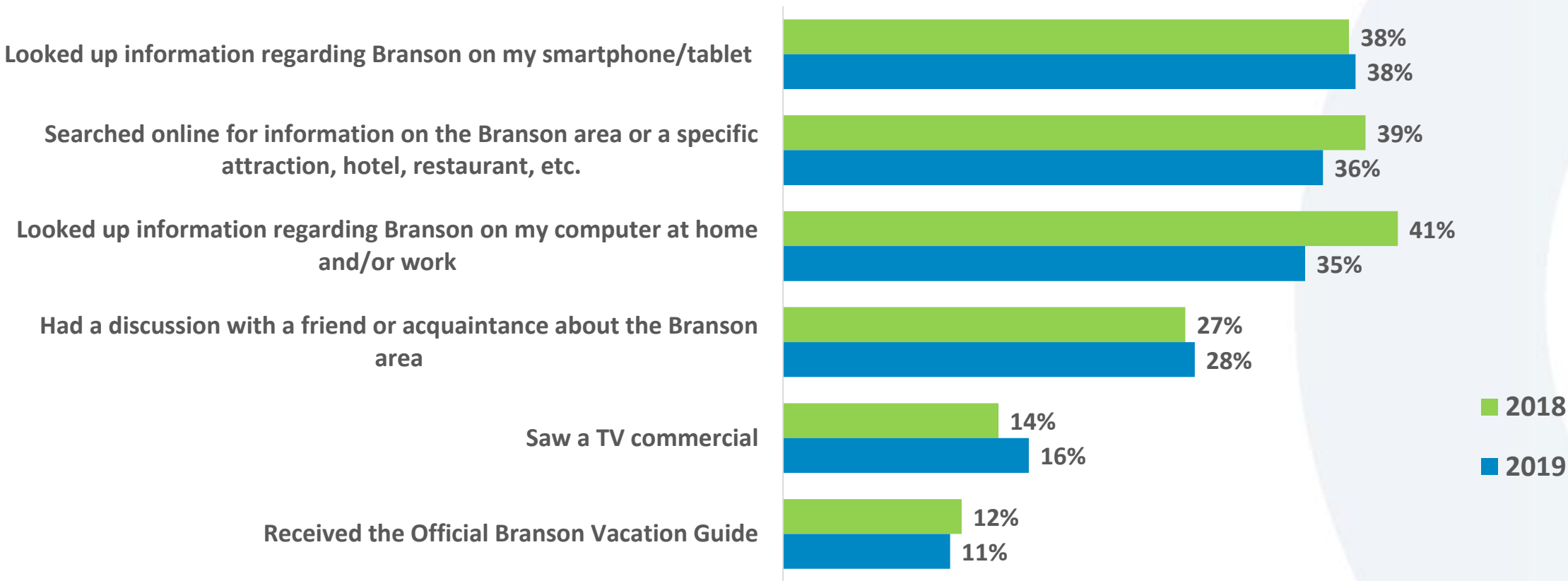
Facebook continues to be Branson’s most popular social media site, with a 4-point increase in usage in 2019. This is followed by YouTube, Instagram and Pinterest.



Q34: In the past year have you visited any of Branson's social media channels listed below? Please select all that apply.

# Searching for information via smartphones topped the list of information sources used this past year while searching online from a computer dropped significantly.

Top Branson Messages Received, Read, Saw or Heard Prior to Visit



Q35: Please indicate which, if any, of the following Branson messages you received, read, saw or heard prior to your visit: Please select all that apply.

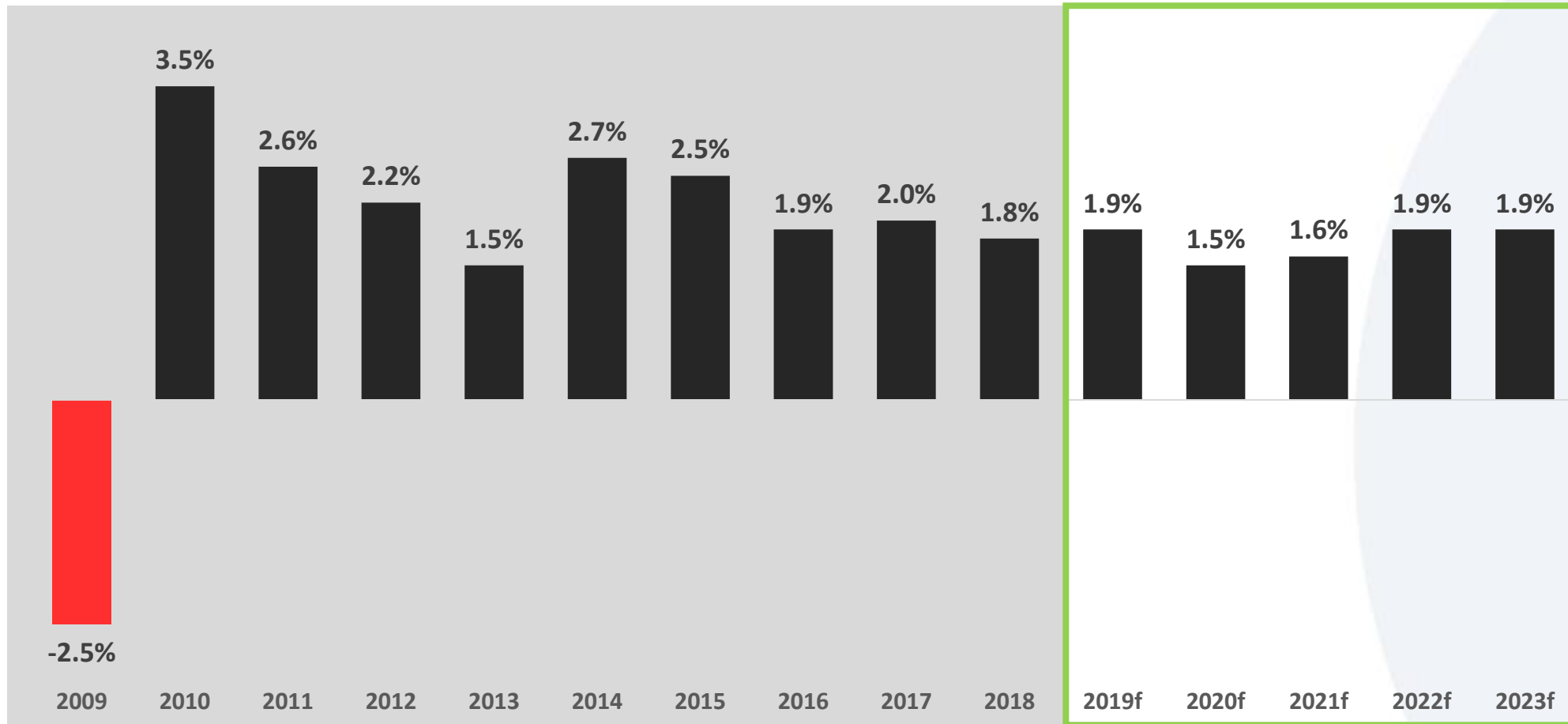
Branson 2019 Visitor Profile Research

# U.S. Travel Performance

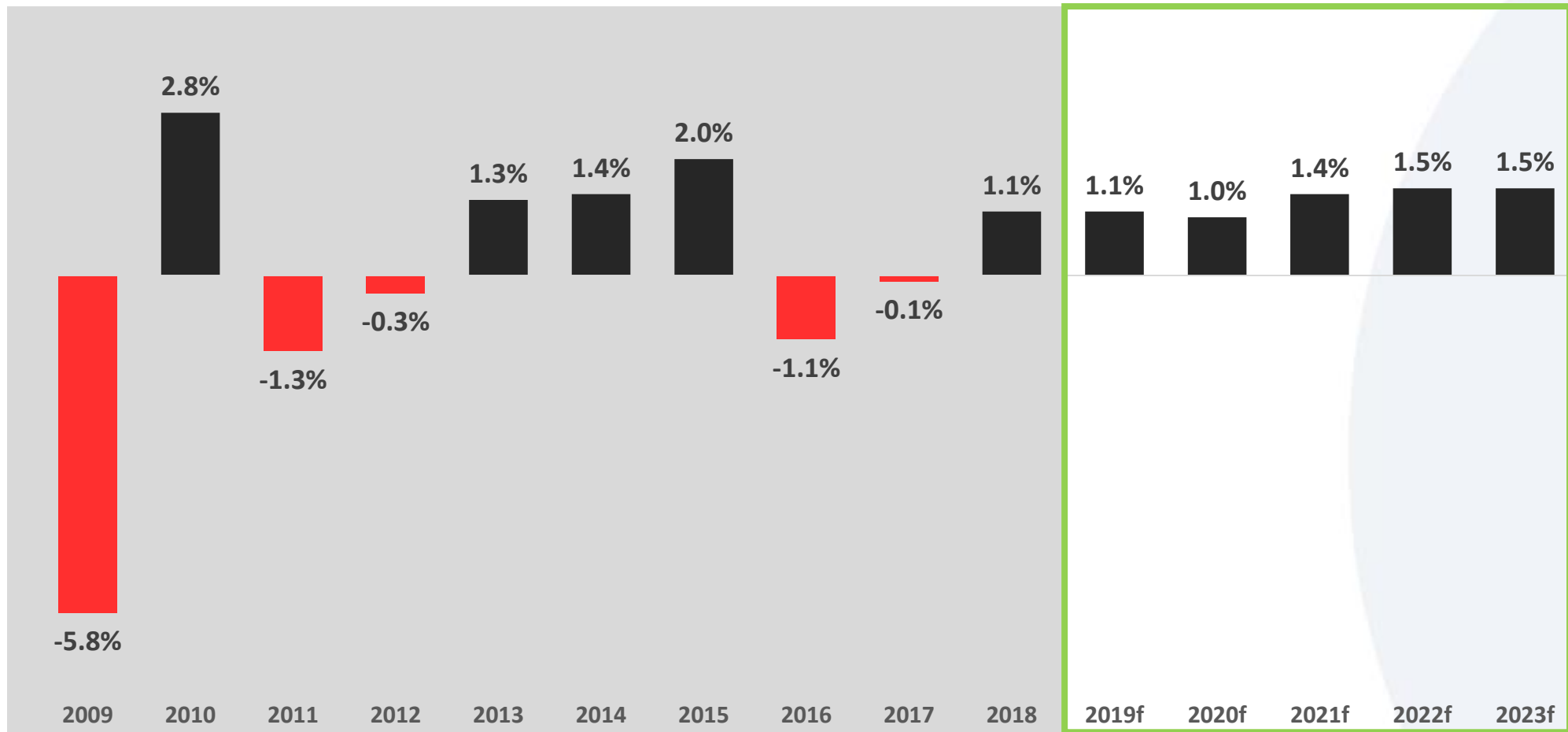




The U.S. Travel Association forecasts that leisure travel will grow by 1.5% in 2020, slightly slower than what was predicted for 2019 (+1.9%).



**Business travel is expected to grow by 1.0% in 2020, on par with growth expected from 2019.**





Branson 2019 Visitor Profile Research

# Executive Summary

RUNAWAY MOUNTAIN



# Key Takeaways

- **Record Visitation.** In 2019, Branson reached record visitation levels at just over 9.1 million,\* up +1.5% over 2018 and topping the previous record set in 2016 at just over 9 million.
- **Repeat Visitation Fuels Increase.** This year, travelers to Branson were more likely to be Repeat Visitors (visited in 2019 or 2018) at 51%, up by a significant\*\* margin of 4.5 points. This marks a 9-point increase over the past 2 years. And, this is a trend that is expected to continue in 2020 as U.S. Travelers' long-haul travel appears to have peaked and expectations are trending more regional with travelers staying closer to home. Branson's ratio of first-time visitors (19%), however, slipped from the previous year.
- **Local Media Influence.** While in the area, visitors are most likely to use local media such as brochures (55%) and billboards (44%) to get information about activities and attractions. However, it's the Official Branson Vacation Guide (61%) that was the most influential in their decision making. This was followed by local coupon books (58%) and local Branson magazines (54%).

\*Branson no longer uses "visitation" as an official estimate of performance. Base=7.0M (2000, DKSA)

\*\*Throughout this presentation the term significant represents a statistically significant variance.





# Key Takeaways

- **Rubber Tire Visitors.** Despite generating a significant number of visits from Outer Markets (301+ miles), most travelers still use personal vehicles to visit Branson (83%, +2pts); though, air travel continues to inch upward as well (+0.2pts to 4.5% in 2019). Most visitors who fly use the Springfield-Branson National Airport (73%, +10pts). However, the addition of new carriers with new destinations in 2018 was able to increase usage of BKG once again, up to 6.3% in 2019.
- **Shifts in Market Drivers.** Live Shows continue to be Branson's primary driver of visitation, but the ratio of visitors patronizing shows has been declining the past 4 years (-9pts to 62%). Silver Dollar City and shopping continue to round out the top 3 "functional" drivers of visitation to Branson, both of which experienced an increase in their share influence compared to 2018 (+1pt and +4pts, respectively).
- **Visitor Spending Holds Strong.** On average, Branson visitor parties spent \$982 during their stay in 2019, up slightly from the \$972 spent last year. The farther visitors travel to visit Branson, the more money and nights they tend to spend in the area.





# Key Takeaways

- **Branson Continues to Generate Strong Market Buzz and Intent to Return.** Branson's Net Promoter Score (NPS) held steady at 61%, comparable to last year's record-breaking score. This is driven by 69% of visitors indicating they would recommend Branson to friends/family with only 8% indicating they would not. Likewise, 70% indicated they definitely will return, with 88% saying they probably/definitely will return – on par with last year and the Historical average of 89%.
- **Demographics Shift.** In 2019 the average adult age of the Branson visitor decreased to 55 years of age in 2019, the lowest average adult age recorded in the past 20 years. This is driven by an influx of young families who visited in larger numbers this past year. Half of Branson visitors had children with them, 7 points higher than last year – making 2019 the largest ratio of family visitors Branson has hosted. Last but not least, average household income is also at an all-time high reaching \$88k.
- **Trip Planning a Priority.** Despite the fact that many of Branson travelers come from Outer Markets (301+ miles), Branson's comparatively high levels of repeat visitation caused decision time to shorten. In 2019, travelers took just 64 days on average to decide to visit—4 days fewer than in 2018.



Thank you!

---

